



Together as the Association of International  
Certified Professional Accountants

An aerial photograph of a city skyline at dusk, with numerous skyscrapers illuminated by their interior lights. The sky is a mix of purple and blue. In the foreground, there is a large green park area with trees and walking paths.

# 2025

Sponsorship opportunities

## Personal Financial Planning Summit

Jan. 26–29, 2025

JW Marriott Charlotte  
Charlotte, NC

**Meeting location:**  
DFA Headquarters

# Become a Summit sponsor.

Be seen as a leader in the industry as one of our sponsors at **AICPA's Personal Financial Planning Summit**, an intensive, one-of-a-kind event developed for experienced financial planning professionals. Being a summit sponsor will give you direct access to firm leaders and decision-makers!

Connect with prominent financial planners, including CPAs, PFP Section members, PFS™ credential holders, CFPs, CFAs and other leading practitioners from investment advisory and wealth management firms. This invaluable time spent face-to-face with existing – and potential – clients is unparalleled at this event.

## All sponsorship packages include:

- Logo on intermission slides played between sessions.
- Sponsor recognition on-site.
- Invitation to attend all on-site food and beverage functions with attendees (does not include private events).

All items are subject to change.



# Sponsorship opportunities

Sponsorships increase your ROI and build brand recognition in a competitive marketplace. The following sponsorships were designed to stretch your marketing budget and help your business stand out as an industry leader.

## Exclusive

\$12,000

### Activity sponsor

- Tuesday evening off-site attendee event with dinner
- Prominent signage
- Logo printed on napkins
- Sponsor ad transition slide displayed before all sessions
- Two (2) all-access badges

## Exclusive

\$8,000

### Reception sponsor

- Monday networking reception at host hotel for Summit attendees
- Sponsor recognition throughout reception
- Logo printed on napkins placed on food and beverage stations
- Table with corporate materials may be set up during reception
- Sponsor ad transition slide displayed before all sessions
- One (1) all access badge

## Exclusive

\$6,000

### Transportation sponsor

- Your logo displayed on bus transportation taking attendees to and from the conference site
- One (1) seat drop of corporate materials
- One (1) bottled water given to each attendee
- Logo on intermission slides played between sessions
- One (1) all-access badge

## Exclusive

\$5,000

### Lanyard sponsor

- Logo displayed on AICPA-provided lanyards
- Logo on intermission slides played between sessions
- One (1) all-access badge

## Exclusive

\$4,000

### Room drop sponsor

- Sponsor-provided gift placed in all attendee rooms on first day of event
- Logo on intermission slides played between sessions
- One (1) all-access badge

\$2,000

### Break sponsorship

- Stay top of mind by keeping on-site attendees refueled and refreshed.
- Sponsorship recognition throughout break area
- Logo on intermission slides played between sessions

All items are subject to change.

Email us today!  
**SPEXevents@hq.cpa.com**

**Start here →**



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