



2026

Sponsorship opportunities



Personal Financial Planning Symposium

Jan. 21–23, 2026

Loews Coronado Bay Resort
Coronado, CA

Become a Symposium sponsor.

Be seen as a leader in the industry as one of our sponsors at the **AICPA's Personal Financial Planning Symposium**, an intensive, one-of-a-kind event developed for experienced financial planning professionals. Being a symposium 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.
- Symposium recognition on-site.
- Invitation to attend all on-site food and beverage functions with attendees (does not include private events).
- Tabletop exhibit space

All items are subject to change.



Material sponsorships

\$5,000

Lanyard

EXCLUSIVE

Promote your brand throughout the entire event with one of the most popular sponsorships.

- Logo displayed on AICPA® provided lanyards
- One (1) sponsor registration badge

\$4,000

Welcome gift

EXCLUSIVE

NEW

Showcase your brand and ensure it is front and center as attendees arrive and settle into their accommodations.

- One (1) sponsor-provided promotional item distributed to attendees in the AICPA guest room block
- Sponsorship recognition in attendee information email
- One (1) sponsor registration badge

\$4,000

Notebook

EXCLUSIVE

Promote your brand as attendees take session notes.

- Logo on notebook with attached pen provided to on-site attendees
- One (1) sponsor registration badge



Technology sponsorships

\$7,000

Wi-Fi

EXCLUSIVE

Gain digital recognition for helping attendees stay connected.

- Logo on back of each attendee badge with Wi-Fi information
- Sponsor selects customized Wi-Fi password *(subject to hotel guidelines)*
- Logo listed in mobile app with Wi-Fi information
- One (1) sponsor registration badge

\$6,000

Mobile app

EXCLUSIVE

Increase your visibility pre-event with the launch of the app and post-event with year-long access.

- Logo on app splash screen
- Logo in pre-event app download instruction manual
- One (1) rotating banner ad *(to rotate with other conference ads and sponsor ads, if applicable)*
- One (1) sponsor registration badge

Networking sponsorships

\$12,000

Activity sponsor

EXCLUSIVE

Your brand will be front and center providing a unique experience for attendees to connect in a memorable way.

- Thursday evening attendee event with dinner
- Prominent signage
- Logo printed on napkins
- Sponsor ad transition slide displayed before all sessions
- Two (2) sponsor registration badges

\$8,000

Networking
reception

EXCLUSIVE

Receive prominent recognition as attendees and exhibitors mingle throughout the Exhibit Hall.

- Sponsor recognition throughout the reception
- Sponsor's logo in pre-event access email
- 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) sponsor registration badge

Networking sponsorships

\$7,000

Lunch

2 AVAILABLE

Gain exposure while attendees network over lunch.

- Sponsorship recognition throughout lunch
- Logo in agenda on mobile app
- Mobile app push notification promoting sponsorship
- One (1) reserved table for sponsor to invite conference attendees
- One (1) sponsor registration badge

\$5,000

Breakfast

3 AVAILABLE

Kick off the day with brand exposure to energized attendees.

- Sponsorship recognition throughout all breakfast areas
- Logo in agenda on mobile app
- Placement near exhibit location (*when available*)
- *Exclusivity option available. See your sales representative for details and special pricing.*
- One (1) sponsor registration badge

\$5,000

All day coffee

2 AVAILABLE

Stay top of mind by keeping attendees refueled and refreshed.

- Sponsor recognition on each beverage station
- Logo printed on coffee sleeves placed on each station
- Logo in agenda on mobile app
- Placement near exhibit location (*when available*)
- *Exclusivity option available. See your sales representative for details and special pricing.*
- One (1) sponsor registration badge

\$2,000

Break

Stay top of mind by keeping on-site attendees refueled and refreshed.

- Sponsorship recognition throughout break area
- Logo on intermission slides played between sessions

Reserve your exhibit space.

Exhibit space and virtual listing

\$4,000

Tabletop

► Tabletop space:

- Two (2) registration badges
- One (1) skirted table
- Two (2) chairs
- One (1) wastebasket

► Includes virtual listing!

Virtual listing

► Virtual listing:

- Company description
- Logo
- Link to website
- Contact information

Additional exhibitor benefits:

- Company profile on mobile app with link to the company website
- Invitation to attend all on-site food and beverage functions with attendees (*does not include private events*)
- Option to purchase additional discounted sponsor registration badges

General information



- Tabletop exhibits must fit on top of your table or be freestanding behind it. Trade show booths are not permitted. Pipe and drape are not provided.
- Electricity is not included, but may be purchased in your exhibitor portal.
- Complimentary Wi-Fi throughout the conference area
- Overnight security will be provided; however, spaces cannot be completely secured



Ready to get started?
Have questions?

Other sponsorship concepts
you'd like to explore?

Contact your sales representative today!

✉ SPEXevents@hq.cpa.com



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