



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

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.

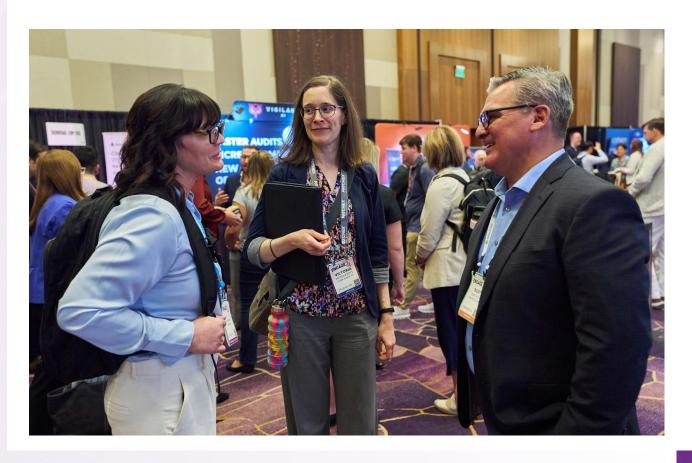
- One (1) sponsor-provided promotional item distributed to attendees in the AICPA guest room block
- · Sponsorship recognition in attendee information email
- One (1) sponsor registration badge

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.

- Tuesday evening off-site 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			
Τ/,	\bigcup	\bigcup	U

2 AVAILABLE

Gain exposure while attendees network over lunch.

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

3 AVAILABLE

Kick off the day with brand exposure to energized attendees.

Breakfast

- 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

2 AVAILABLE

Stay top of mind by keeping attendees refueled and refreshed.

- All day coffee
- 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

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

Break

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



Reserve your exhibit space.

Exhibit space and virtual listing

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:

- · Company description
- · 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





Founded by AICPA and CIMA®, the Association of International Certified Professional Accountants powers leaders in accounting and finance around the globe.

© 2025 Association of International Certified Professional Accountants. All rights reserved. Association of International Certified Professional Accountants is a trademark of the Association of International Certified Professional Accountants and is registered in the US, the EU and other countries. The Globe Design is a trademark owned by the Association of International Certified Professional Accountants. 2508-363473