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**Practical
Accountant**

PRESENT:

2nd Annual Financial Planning Summit for Accountants:

How to Get into
Financial Planning and
Make Money out of it

July 22-23, 2009
Sheraton Gateway Suites
Rosemont, IL
(Chicago O'Hare)

SPONSORSHIP AND EXHIBIT PROSPECTUS

A NOTE FROM 2008 SPONSOR *Honkamp Krueger Financial Services, Inc. on their experience at last year's event...*

Our participation in the first Financial Planning Conference for CPAs sponsored by SourceMedia and CPA Wealth Provider magazine has proven to be a wise investment in every way. We learned a great deal, meeting knowledgeable industry leaders with great insights into the how and why of adding this valuable practice niche. As a provider, we gained national exposure and developed leads with firms who now work with Honkamp Krueger Financial Services, Inc. From the 2008 conference, we learned your organization is in

a unique position to bring together the best providers, consultants, and entrepreneurial firms. The byproduct is success at growing profits and firm value.

Thanks for inviting us last year. We certainly look forward to the 2009 Financial Planning Summit for Accountants. We know it leads to profits!

James W. Herrig, J.D., *Vice President & Counsel,*
HONKAMP KRUEGER FINANCIAL SERVICES, INC.



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ABOUT THE EVENT

THE FINANCIAL PLANNING SUMMIT FOR ACCOUNTANTS is the only event in the nation solely dedicated to helping accounting professionals enter the financial planning market as well as providing actionable content for those firms looking to grow their financial planning practice.

The conference helps firms determine if they should be in this growth area and in what capacity. Attendees learn the importance of selecting the right business model, as well as the right strategic partner, and how to get financial planning up to speed quickly. The agenda is highlighted by valuable lessons learned from CPAs who have failed and succeeded in financial planning, with tips on how to plan carefully and avoid pitfalls.

This year's event will include two new tracks, providing a wide range of topics for people with different levels of experience in the financial planning arena.

• TRACK ONE: NEW FINANCIAL PLANNERS

Track One will be for those who have not yet made the jump into financial planning. These sessions will explain in a nuts n' bolts way exactly the criteria for moving into financial planning, what factors to consider, the best business model, what licenses are needed, and more.

• TRACK TWO: EXPERIENCED FINANCIAL PLANNERS

Track Two will be for those who are presently in financial planning but need to expand their base, increase the number of clients, and grow their revenue. These sessions will help attendees examine their business model, determine whether they should be using a broker/dealer, investigate marketing strategies, deal with today's nervous client, and more.

View the full agenda at
www.sourcemediaconferences.com/CPA

As an exhibitor or sponsor of this event, you will:

- Network with CPAs who are currently working as financial planners and those who are seriously considering a move into financial planning
- Increase ROI through live-event marketing
- Take advantage of our extended networking breaks and display your technology and services
- Enjoy plenty of face time with highly qualified prospects

WHO YOU WILL MEET

Here is a list of some of the participants of last year's event.

5 Star Financial Solutions	Koenig, Russo & Associates
Acevedo & Company	Kraft & Company
American Institute of Certified Public Accountants	Lassus Wherley
Arnold Advisors	Mark A McNamee CPA
BAM Advisor Services	McDevitt & Andreason
Bedford Tax Services	MFAC Financial Advisors, Michael S. Martinez
Bloomberg News	Middleton Accounting & Consulting, Inc.
Brighton Securities	Mitchell, Kulick & Company
Brown Smith Wallace	Moon
Buckingham Asset Management	Moore, Horton & Carlson
Charles Hobbs CPA	Morningstar Inc.
CPA Wealth Provider	Moss Adams Wealth Advisors
Crosley+Company	NYSEWANDER
DCA	Oppenheimer & Co.
Diel & Ferguson	Orizon CPAs
Dixon Hughes	Peters, Browning & Co., Pinnacle Wealth Planning Services
Duerr & Duerr, CPA	Porte Brown
Eck Schafer & Punke	QFN
Ed Zychowski	Rochdale Investment Management
FiveStar3	RSM McGladrey, Inc.
Fowler Durham & Company CPAs	Salandra & Serluca
Frost	Saluting Success
Gardiner Thomson	Schenck Business Solutions
Genworth Financial Investment Services, Inc.	Scott & Scott CPA
Greenlight Fee Only Advisors	Signature Advisor Group
GZK	Terry McMahon & Co.
Heinold-Banwart	Topel Forman Consulting Turman Group.
Helvetica Financial	Vitale Caturano & Co.
Holt & Patterson	William Vaughan Company
Honkamp Krueger Financial Services	
Jackson Thornton	
JANE SMILEY CPA	
Johanna Fox, CPA	
John Laskey & Company	
Joseph D. Brophy CPA	
Kiely Capital Management,	

For more information about participating in
FINANCIAL PLANNING SUMMIT FOR ACCOUNTANTS contact:

Chris Frey | 212.803.6568 | Christopher.Frey@sourcemedia.com



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STANDARD EXHIBIT SPACE PACKAGE

\$3,250

Includes:

- 10' x 10' exhibit space with standard pipe & drape and company identification sign
- Three full conference registrations for your staff
- Your company logo and fifty word company description in the conference workbook, including contact names and numbers
- Inclusion in all house advertising and direct marketing promoting the conference
- Your company logo on the conference Web site with a link back to your company Web site
- Pre-Conference attendee mailing list
- Post-Conference attendee mailing list
- Signage promoting your company's exhibit
- Complete set of conference registration materials including documentation book

SPONSORSHIP PACKAGES

Platinum Sponsorship Package

Only Three Available

\$10,500

Conference and Exhibition Presence

- One 10X10 exhibitor space
- Partner banner position available in pre-function and/or registration areas
- Co-host opening night cocktail reception to include logo napkins and signage
- Conference tote bag with sponsor logos given to all attendees at registration
- Position on conference Advisory Board
- Logo on cover of conference document book
- Reserved premium full page, 4-color advertisement in the conference documentation book.
- Logo and 50-word company profile in conference documentation book. Logo on event Web site with link back to your company site

Brand Reach

- Inclusion as sponsor in all advertising, marketing and promotion of the conference, including:
 - Direct mail campaign – Commit by 4/15 and get logo in conference brochure
 - Direct email campaign of 100,000+ emails in no fewer than 8 distinct efforts.
 - All conference advertising in Accounting Technology, Accounting Today and Practical Accountant

Relationship Building

- Reserved guest list: Right to submit a maximum of 5 customer and prospect names for invitation to the conference as Sponsor guests
- Five full-conference passes for sponsor
- Five complete sets of conference registration materials, including documentation book
- Pre- and post-conference attendee mailing list

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ADDITIONAL SPONSORSHIP OPPORTUNITIES

Registration/Lanyard Sponsorship \$5,000

- Custom badge lanyards distributed to all attendees includes logo of sponsor
- Insert of marketing piece into each tote bag distributed to all attendees
- Two conference passes
- Signage promoting the sponsorship on display throughout length of conference
- Inclusion in all house advertising promoting this conference
- One 4-color, full page advertisement (7x10) in the conference documentation workbook
- Complete set of conference registration materials includes documentation book.
- Fifty-word (50) company description in conference documentation book
- Firm name or logo included in direct-mail brochure, if applicable
- Pre- and post-conference attendee mailing list
- Logo on the conference Web site with link back to your company site

Lunch Sponsorship \$5,000

- Napkins with company logo to be placed by food area
- Signage promoting sponsorship
- Two conference passes
- Inclusion in all house advertising promoting this conference
- One full page 4-color advertisement (7x10) in the conference documentation workbook
- Fifty-word (50) company description in conference documentation book
- Firm name or logo included in direct-mail brochure, if applicable
- Pre- and post-conference attendee mailing list
- Logo on the conference Web site with link back to your company site
- Complete set of conference registration materials includes documentation book.

Seat Drop Sponsorship \$5,000

- Opportunity to place marketing material on each seat in the General session on the first or second morning of the conference
- Signage promoting sponsorship
- One 4-color, full page advertisement (7x10) in the conference-documentation workbook
- Two conference passes
- Inclusion in all house advertising promoting this conference
- Fifty-word (50) company description in conference documentation book
- Firm name or logo included in direct-mail brochure, if applicable
- Pre- and post-conference attendee mailing list
- Logo on the conference Web site with link back to your company site
- Complete set of conference registration materials includes documentation book

Refreshment Break Sponsorship (AM and PM) \$5,000

- Custom napkins/coffee cups with company logo branded on each to be placed in break area
- One 4-color, full page advertisement (7x10) in the conference-documentation workbook
- Signage promoting sponsorship
- Two conference passes
- Inclusion in all house advertising promoting this conference
- Fifty-word (50) company description in conference documentation book
- Firm name or logo included in direct-mail brochure, if applicable
- Pre- and post-conference attendee mailing list
- Logo on the conference Web site with link back to your company site
- Complete set of conference registration materials includes documentation book

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Continental Breakfast Sponsorship \$5,000

- Company logo on napkins and coffee cups during breakfast
- One 4-color, full page advertisement (7x10) in the conference documentation workbook
- Signage promoting sponsorship
- Two conference passes
- Inclusion in all house advertising promoting this conference
- Fifty-word (50) company description in conference documentation book
- Firm name or logo included in direct-mail brochure, if applicable
- Pre- and post-conference attendee mailing list
- Logo on conference Web site with link back to your company site
- Complete set of conference registration materials includes documentation book

Hard Candy Sponsorship \$5,000

- Wrapped hard candy with company logo distributed to all attendees for the length of the conference
- One 4-color, full page advertisement (7x10) in the conference documentation workbook
- Signage promoting sponsorship
- Two conference passes
- Inclusion in all house advertising promoting the conference
- Fifty-word [50] company description in the conference documentation book
- Firm name or logo included in direct-mail brochure, if applicable
- Pre- and post-conference attendee mailing list
- Logo on conference Web site with link back to your company site
- Complete set of conference registration materials, includes documentation book

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