NEWS

For Immediate Release

Media Contact:
Jonny Swift
Impact Communications, Inc.
913-649-5009
JonnySwift@ImpactCommunications.org

Alliance of Comprehensive Planners (ACP) Announces Details of 2023 Annual Conference

Plus shares highlights and resources from 2022 conference

WILMINGTON, NC (September 19, 2023) – The Alliance of Comprehensive Planners (ACP), a community of tax-focused, fiduciary financial advisors who provide comprehensive wealth building strategies for their clients on a commission-free retainer basis, recently announced the details of their upcoming 2023 ACP Annual Conference, which will take place November 7-10, 2023 at The Davenport Grand in Spokane, Washington.

The ACP expects over 100 members to attend this year's conference – in addition to other advisors, partners, sponsors, vendors, and journalists – which will feature a handful of keynote speakers, a plethora of breakout sessions, multiple preconference workshops, a robust exhibit hall, video, podcast, and other media opportunities, social events and receptions, networking, and more. In addition, the ACP will present two awards to ACP members: The Bert Whitehead Visionary Award, created in honor of the founder of the ACP, and the Stewart Farnell Award for Excellence in Mentoring.

KEYNOTE PRESENTATIONS FROM INDUSTRY LEADERS

While the conference will kick off on Tuesday, November 7th with a welcome reception in the exhibit hall and preconference workshops from Marc Kiner of Premier Social Security Consulting, David Podell of Business Benefits Consultants,, and Thomas VanNess of VanNess Law, the first full day of the conference on Wednesday, November 8th will start with a keynote session from Angela Herbert White, M.Ed, PCC titled "First Lead Yourself, Then Lead YOUR Way". White, a sought-after personal and professional coach and consultant, will share how you can become an effective, authentic leader in your own way, while offering tools to get there.

Thursday, November 9th will begin with a keynote session from Ann Garcia, CFP®, founder of The College Financial Lady and owner of Independent Progressive Advisors, discussing how advisors can use college planning to add value to their clients and to their practice.

Steven Jarvis, CPA, MBA of Retirement Tax Services will also deliver a keynote session that day, titled “What You Should Have Already Done About SECURE 2.0 and What to Do Next”, where he’ll cover what the SECURE 2.0 Act means for advisors, their clients, and their practice while providing specific, actionable advice that can be implemented today.

ACP member Linda Leitz, PhD, CFP®, EA, founder of Peace of Mind Financial Planning, will close the conference on Friday, November 10th with a keynote presentation on ethics, where CFPs can earn their ethics CE credits.

To learn more about the keynote speakers, please click here. To see the full agenda, please click here.

REGISTRATION INFORMATION FOR THE 2023 ACP CONFERENCE

Registration is now open to ACP members and also non-member financial advisors. In addition, guest passes are available for certain events. Early bird pricing is available through October 8th, 2023: $875 for ACP members and $1000 for non-members. To register for the conference, please click here. To learn more about the hotel and reserve your room, please click here. Journalists interested in attending the conference, please email Anne@ACPlanners.org.

2023 SPONSORS AND SPONSORSHIP OPPORTUNITIES

Conference sponsors so far include Asset Dedication, Bert Whitehead, Dimensional, Finance of America Reverse, Longbridge Financial, Bento Engine, the Law Office of Lori J. Neidel, Mortgage Twins, the Brandt Team at Northpointe Bank, Premier Social Security Consulting, and VanNess Law. Companies that are interested in sponsoring this year’s conference can click here for more information on sponsorship opportunities.

HIGHLIGHTS FROM THE 2022 ACP ANNUAL CONFERENCE

The 2022 ACP Annual Conference took place in Minneapolis, Minnesota in late September 2022 and featured over 100 ACP members and other attendees. Keynote sessions were delivered by:

- Mitch Anthony, founder and president of Advisor Insights Inc., speaking on ‘Becoming a Better Biographer of Your Clients’
- Ben Malin, Vice President of Monetary Policy and the Economic Outlook at the Federal Reserve Bank of Minneapolis, speaking on ‘Monetary Policy and the Economic Outlook’
- Kristen Schmidt, founder and president of RIA Oasis, speaking on ‘Is There Really a "Hub" in My Tech Stack? The Four Must Have Tech Tools’
- Arash Shokouh, founder of Ophtek, speaking on ‘Protecting Your Business From Modern Cyber Threats and Implementing Cybersecurity Policies’

Preconference workshops were led by Dan Smaida of AdvisoryEDGE and Linda Leitz of Peace of Mind Financial Planning, with a variety of breakout sessions throughout the conference on virtual client engagement, communication strategies, ethics, time horizons across asset classes, Roth conversions, reverse mortgages, succession planning, long term care insurance, healthcare planning, tax planning, compliance, mergers and acquisitions, SEO and online presence, and more.

In addition, the ACP conferred two annual awards: the Bert Whitehead Visionary Award and the Stewart Farnell Award for Excellence in Mentoring.

The Bert Whitehead Visionary Award, which was created in honor of the founder of ACP and bears his name, serves to recognize an advisor who exemplifies the ACP methodology and successfully utilizes its principles, demonstrates vision and innovation in the financial planning field, and has made significant contributions to the growth and well-being of ACP as an organization. Karen Folk, Ph.D., CFP®, Advisor Emeritus at Bluestem Financial Advisors in Savoy, Illinois, was the recipient of this prestigious award at the 2022 conference.

The Stewart Farnell Award for Excellence in Mentoring is awarded on an annual basis to an ACP member who exemplifies the kind of coaching, mentoring, and support of fellow ACP members for which Stewart Farnell was known. Kelly Adams, CFP®, EA, RLP, founder and Senior Planner at Harbor Light Planning in Wixom, Michigan, received this honor at the 2022 conference.

As a capstone to the 2022 conference, the ACP released a special podcast episode, featuring a compilation of ACP Member insights, on their Practical Wisdom podcast. Each member in this episode provided a top tip, tool, and/or words of wisdom when it comes to running and managing an independent advisory firm. Guests included:

- Sheila Padden, CPA, CFP®, RLP®, Founder of Padden Financial Planning
- Cordi Powell, CFP®, EA, Founder of Favored Financial Planning
- Bridget Sullivan Mermel, CFP®, CPA, Founder of Sullivan Mermel, Inc.
- John Scherer, CFP®, Founder of Trinity Financial Planning
- Kelly Adams, CFP®, RLP®, EA, Founder of Harbor Light Planning
- Rorik Larson, MBA, CFP®, EA, Founder of Essential Financial Strategies
- Brian Leben, CFP®, PFS, CPA, MBA, CGMA, Owner of Midwest Wealth Solutions
- Wendy Marsden, CFP®, CPA, Founder of ProsperiTea Planning
- Zach Teutsch, Founder of Values Added Financial
- Hannah Basil Bryant, CFP®, Financial Advisor at Savant Wealth Management

In addition, several ACP members recorded videos at the conference, where they explain why they became an ACP member and how much they value the ACP community.

To view the video showcase, please click here. To listen to the podcast episode, please click here.

ABOUT THE ALLIANCE OF COMPREHENSIVE PLANNERS (ACP)

The Alliance of Comprehensive Planners (ACP) is a community of tax-focused financial advisors who provide comprehensive planning strategies for their clients on a commission-free retainer basis. As fee-only fiduciaries, ACP members are required to maintain the CFP® or CPA/PFS (or equivalent) designation and complete ACP's rigorous training program.

The Practical Wisdom podcast, presented by the Alliance of Comprehensive Planners and hosted by ACP member Ken Robinson, CFP®, JD, offers an interesting array of ACP advisors sharing stories of how they became successful, fee-only, comprehensive financial advisors. Through these conversations, Practical Wisdom reveals the strategies, tips, and tools these advisors employed to get where they are today. To access these informational Practical Wisdom podcast episodes, please click here.

To learn more about this fiduciary network or to find a certified ACP member, visit www.ACPlanners.org.

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