Convince Your Boss to let you attend the

April 2023 Kitces Marketing Summit

Dear <BOSSNAME>,

I am writing to request your approval to attend the virtual Kitces Marketing Summit on the [morning/afternoon] of Thursday, April 27, 2023.

The Kitces Summit is a 4-hour virtual conference that features a behind-the-scenes look at what other successful financial planners are doing in their practices. The event is hosted by two of the biggest names in our industry – Michael Kitces (Kitces.com[,](https://www.kitces.com/) [XYPN](http://XYPN)[, Advice Pay](https://www.kitces.com/)[) and Taylor Schulte (](https://advicepay.com/)[Define Financial](https://www.definefinancial.com/)[,](https://advicepay.com/) [Experiments in Advisor Marketing podcast](https://www.taylorschulte.com/podcast/)[,](https://advicepay.com/) [Advisors Growing as a Community](https://advisorgc.com/)[).](https://advicepay.com/)

[The Kitces Summit is not a typical event. Instead of telling attendees what they should do, advisor guest presenters show (via screenshare) what they are actually doing in their successful practices to tackle common challenges. There are no vendors, sponsors, or PowerPoint lectures. Just real-world conversations with advisors who know what success looks like.](https://advicepay.com/)

[The upcoming Kitces Summit on April 27th will feature what financial advisors are doing in their practices to attract prospects and clients. Specifically, six practicing advisors will take attendees behind the scenes and share the inside view of their real-world strategies involving COIs, referrals, third party lead generation programs, and in-person events. They’ll share what they use in prospect and client meetings, the tools and software they’re using, the deliverables they’ve created, and what they’re actually doing that’s worked.](https://advicepay.com/)

[My intention is to collect all of the information offered at the Kitces Summit (both by attending live on April 27th and reviewing the included recording and handouts afterward) and then share key takeaways with you, including those that we can implement immediately in our firm. Additionally, I plan to walk away from the event having learned:](https://advicepay.com/)

* [ADD GOAL 1](https://advicepay.com/)
* [ADD GOAL 2](https://advicepay.com/)
* [ADD GOAL 3](https://advicepay.com/)

[The cost to attend the Kitces Summit is $397. I could save $100 off the registration cost (bringing the cost of attendance to only $297) by purchasing a](https://advicepay.com/) [[Kitces Premier Membership](https://advicepay.com/)](https://www.kitces.com/become-member-for-imca-ce-and-cfp-ce-credits/) [for $150 (total cost of $447) which would allow me to access all the Kitces CE programs, and their monthly Office Hours and monthly webinars for a full year as well.](https://advicepay.com/)

[I believe my attendance at the Kitces Summit, and the resulting best practices I will be exposed to, will exceed the investment you’ll be making in approving this request.](https://advicepay.com/)

[Thank you for your consideration!](https://advicepay.com/)