Convince Your Boss to let you attend the December 2026 Kitces Value Summit

Dear <BOSSNAME>,

I am writing to request your approval to attend the virtual Kitces Value Summit on the Thursday, December 10, 2026.

The Kitces Value Summit is a 4-hour virtual conference that features a behind-the-scenes look at how successful advisors demonstrate and communicate their value to prospects, new clients, and ongoing clients.

The event is hosted by two of the biggest names in our industry – Michael Kitces (Kitces.com, XYPN, Advice Pay) and Taylor Schulte (Define Financial, Experiments in Advisor Marketing podcast, Advisors Growing as a Community).

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 or sponsors. Just real-world conversations with advisors who know what success looks like.

The upcoming Kitces Summit on December 10th will feature six practicing advisors as they share what actions they've taken to demonstrate their value to prospects before they're clients, to new clients during onboarding and plan delivery, and to existing clients on an ongoing basis.

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

- ADD GOAL 1
- ADD GOAL 2
- ADD GOAL 3

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 Kitces Premier Membership, which would allow me to access all the Kitces CE programs, and their monthly Webinars for a full year as well.

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.

Thank you for your consideration!