Convince Your Boss to let you attend the December 2024 Kitces Value Summit

Dear <BOSSNAME>,

I am writing to request your approval to attend the virtual Kitces Value Summit on the [morning/afternoon] of Thursday, December 12, 2024.

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

The upcoming Kitces Summit on December 12th will feature what financial advisors are doing in their practices to communicate their value to prospects and clients. Specifically, six practicing advisors will take attendees behind the scenes and share the inside view of their real-world strategies in prospect meetings, in plan presentation meetings, and in between meetings with clients. They’ll share what they use in these meetings, the tools and software they’re using, the deliverables they’ve created, and what they’re actually doing that’s worked.

My intention is to collect all the information offered at the Kitces Summit (both by attending live on December 12th 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](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 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!