



Financial Planning
**VIRTUAL
SUMMITS**

ARTIFICIAL INTELLIGENCE

**From Data to Decisions: AI Tools
Powering Modern Advisory Firms**

July 30, 2025

From Data to Decisions: AI Tools Powering Modern Advisory Firms

The rapid advancement of artificial intelligence (AI) and data analytics is empowering registered investment advisors (RIAs) to provide clients with hyper-personalized financial planning and investment strategies. By using AI-powered platforms, RIAs can more readily assess a client's financial data and spending, lifestyle-driven investment goals, and risk tolerance to develop highly personalized plans that meet an individual client's investment objectives, while also offloading tasks that do not create added value for the client relationship.

Panel 1

The Future is Here

Why AI Tools and Platforms are Critical to Deepening Client Relationships

Panel 2

The Growing Imperative of Developing Digital-First Advisory Relationships

Panel 3

Building an AI Tech Stack That Works for You and Your Clients

Why Sponsor and General Audience

Tap Into the Power of the *Financial Planning* Virtual Summits

Financial Planning's Virtual Summits bring together a powerful community of industry leaders, disruptors, innovators, and decision-makers who are shaping the future of wealth management and financial services. These exclusive gatherings are more than just events—they are dynamic hubs where top professionals connect, collaborate, and engage in the conversations that matter most.

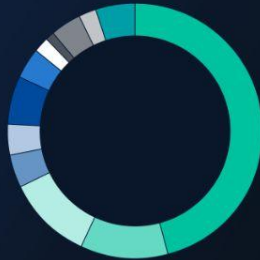
TOTAL AUDIENCE REACH

496K

LEADERSHIP

79%

JOB ROLE



- 46% Financial Advisor/Wealth Manager
- 11% Executive Management/Principal/Partner
- 11% Technology
- 4% Accounting
- 4% Marketing
- 6% Sales (Retail/Client)
- 4% Industry Advisory & Consulting
- 2% Compliance
- 1% Trading
- 4% Investment/Portfolio Management
- 2% Insurance/Asset Management
- 5% Other

Sponsorship Opportunities

PANEL PARTICIPATION

\$15,000

3 available

- Opportunity to speak on or moderate on one session. Speaker subject to approval
- Financial Planning will develop the session focus and deliverables, recruit all remaining speakers and/or moderators, and coordinate panel participation
- Includes access to the session recording
- Noted as a sponsor in dedicated promotional emails and on the dedicated virtual summit website

* Includes attendee list (attendee phone numbers excluded)

SPOTLIGHT VIDEO

\$12,500

3 available

- Opportunity to present a 2-minute video interview hosted with Financial Planning
- Editor-in-Chief (sponsor to provide interview questions)
- Video labeled as sponsored for transparency, will be edited for length and clarity, and include
- Accounting Today-branded intro and outro
- Full ownership of rights to use recorded mp4 video in future communications
- Noted as sponsor in dedicated promotional emails and on dedicated virtual summit website

* Includes attendee list (attendee phone numbers excluded)

SUPPORTING SPONSOR

\$7,500

- Noted as a sponsor in dedicated promotional emails and on the dedicated virtual summit website
- Includes post summit conference attendee list (includes name, title and company only)

**To confirm your partnership or for more information,
please contact Mike Schott at**

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