

NEWS

For Immediate Release

Media Contact:

Jonny Swift

Impact Communications, Inc.

913-649-5009

JonnySwift@ImpactCommunications.org



Alliance of Comprehensive Planners (ACP) Shares Details on 2024 Annual Conference

Plus shares highlights and resources from 2023 conference

WILMINGTON, NC (June 12, 2024) – 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 shared additional details of their upcoming [2024 ACP Annual Conference](#), which will take place October 8th-11th, 2024 at Hyatt Regency’s Riverfront Hotel in Savannah, Georgia.

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, October 8th with preconference workshops and a welcome reception in the exhibit hall, the first full day of the conference on Wednesday, October 9th will start with a keynote session Diane MacPhee of [DMAC Consulting Services](#). MacPhee, a CFP® and Professional Certified Coach, will provide a fast-track plan to execute the ten tips that she believes are significant and causative for success in building a better business.

Thursday, October 10th will begin with a keynote session from Dr. Meghaan Lurtz, Ph.D., FBS™, a Professor of Practice at Kansas State University, where she teaches courses for the Advanced Financial Planning Certificate Program, a lecturer at Columbia University, where she teaches Financial Psychology, and an on-staff writer and researcher of financial psychology at [Kitces.com](#). Lurtz’s presentation will cover questions that financial advisors can ask to foster better client connections throughout the financial planning relationship.

Reginald "Reggie" Chever II of the [Federal Reserve Bank of Atlanta](#) will also deliver a keynote that day, sharing an update from the Federal Reserve.

Brooklyn Brock, CFP®, CEPA®, ChFC®, CKA® of [Ellevate Advisors](#), whom provides financial planning and exit planning services for financial advisors themselves, will close out the conference on Friday, October 11th with a keynote session titled “The Hit-By-A-Bus Workflow”.

To learn more about the keynote speakers, [please click here](#). To see the full agenda, [please click here](#).

REGISTRATION INFORMATION FOR THE 2024 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 June 15th, 2024: \$900 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.

2024 SPONSORS AND SPONSORSHIP OPPORTUNITIES

Conference sponsors so far include Asset Dedication, Bert Whitehead, Dimensional Fund Advisors, Finance of America Reverse, Longbridge Financial, and LLIS, among others. Companies that are interested in sponsoring this year’s conference can [click here for more information on sponsorship opportunities](#).

HIGHLIGHTS FROM THE 2023 ACP ANNUAL CONFERENCE

The [2023 ACP Annual Conference](#) took place in Spokane, Washington in November 2023 and featured over 100 ACP members and other attendees. Keynote sessions were delivered by Angela Herbert White, M.Ed., PCC, discussing tools to help advisors become better leaders; Ann Garcia, CFP®, discussing how to use college planning to add value to clients; Steven Jarvis, CPA, MBA, discussing what SECURE Act 2.0 means for advisors, their clients, and their practice; and Linda Leitz, PhD, CFP®, EA, presenting a dynamic program on ethics.

Preconference workshops were led by Marc Kiner of Premier Social Security Consulting, David Podell of Business Benefits Consultants, and Thomas VanNess of VanNess Law, with a variety of breakout sessions throughout the conference on social security, tax strategies, asset protection and wealth transfer strategies, client conversations, special needs planning, compliance, investment principles, cybersecurity, artificial intelligence, niche marketing, 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. [Ted Roman, CFP®](#), Owner of Roman Financial Advisors in San Diego, California, was the recipient of this prestigious award at the 2023 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. [Penny Marchand, CFP®, EA](#), Founder of Cambridge Financial Group in Tucson, Arizona, received this honor at the 2023 conference.

As a capstone to the 2023 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:

- Michael Garber, CFP®, CRTP, MSEE, Founder of [Michael Garber Financial Planning](#)
- Sheila Padden, CPA, CFP®, RLP®, Founder of [Padden Financial Planning](#)
- Kelly Adams, CFP®, RLP®, EA, Founder of [Harbor Light Planning](#)
- Tim Massie, CFP®, Founder of [Timepiece Financial Planning](#)
- Steven Jarvis, CPA, MBA, Founder of [Retirement Tax Services](#)
- Wesley Stien, CFP®, MBA, Principal at [Lodestar Financial Management](#)
- Steve Martin, CFP®, CPA, JD, LL.M., Owner of [Oasis Wealth Planning Advisors](#)
- Ken Robinson, CFP®, JD, Founder of [Practical Financial Planning](#)
- Elizabeth Buffardi, CFP®, CPA, Founder of [Crescendo Financial Planners](#)
- Thomas Cook, CFP®, EA, Founder of [Retire To Tellico](#)
- Laura Rotter, CFA, MBA, CFP®, Founder of [True Abundance Advisors](#)

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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