KITCES SUMMIT

What Is A Kitces Summit?

- 4-hour virtual events
- Series of six 30-min sessions
    - Each featuring one Advisor "Guest" sharing something they successfully do in their practice
- Marketing Summit
    - Attracting new clients to your practice
    - Runs in June
- Value Summit
    - Delivering value to clients and showing that value to prospects
    - Runs in December

What Makes Kitces Summits Different?

- Advisors, Not Vendors & Consultants
  - Behind-the-scenes view of successful practices
- “Show, Don’t Tell” style
  - Screenshares, not PowerPoints
- Conversation, not Presentation
  - Casual discussion with cohosts
- Inspiring, not Should’ing
  - Inspires fellow advicers with what you’ve done, not telling them what they ‘should’ do

Who Are Summit Guests?

Our ideal advicer guest:

- Is relatable to fellow advisors
- Is tackling a common problem and has created a solution that's brought measurable positive results for themselves
- Is open to sharing details of their solution and has a desire to give back to the profession and help others
- Has built a system or processes to run the solution repeatably and refined it over time
- May or may not have a large following or much public speaking experience

What Do Summit Guest Presenters Receive?

- A platform to share your successful strategies in front of your peers
- An opportunity to give back to the advicer community
- A chance to work directly with Michael Kitces and Taylor Schulte
- Payment of $2,000 for a 30-minute demonstration, and an exclusive box of Kitces goodies

When Is The Next Summit?

The upcoming Kitces Value Summit will be held on **December 10, 2026 from 12-4PM ET** and will showcase advisors who are having success communicating the value of financial planning to prospects, new clients during onboarding and plan delivery, and to existing clients on an ongoing basis.

Save the date!
December 10, 2026
12-4PM ET
***virtual event**

What Does A Submission Include?

Submit via: **kitces.com/summit-presenters**

Fill out the form, including:

- What type of tactic you are sharing (Process/Deliverable/Tool/Script or Other)
- Who it is for (Prospects/New Clients/Ongoing Clients)
- A few sentences of description of your tactic (how it is used/delivered/experienced by prospects or clients)
- A sentence describing the results you've had and/or how you measure ROI

Imagine a new co-worker is looking over your shoulder as you walk them through your process.

We need the key details, but don't worry about the polish.

What has been featured before (something on this list can be shown again in a different way by a new advisor!)

Tool
A system, dashboard, or app clients or prospects interact with directly.

Examples:
- Client-Facing Task Manager
- Values-and-Goals Discovery Exercise (card decks, workbooks, etc.)
- Fee Calculator

Process
A repeatable sequence of steps or meetings your firm runs the same way every time.

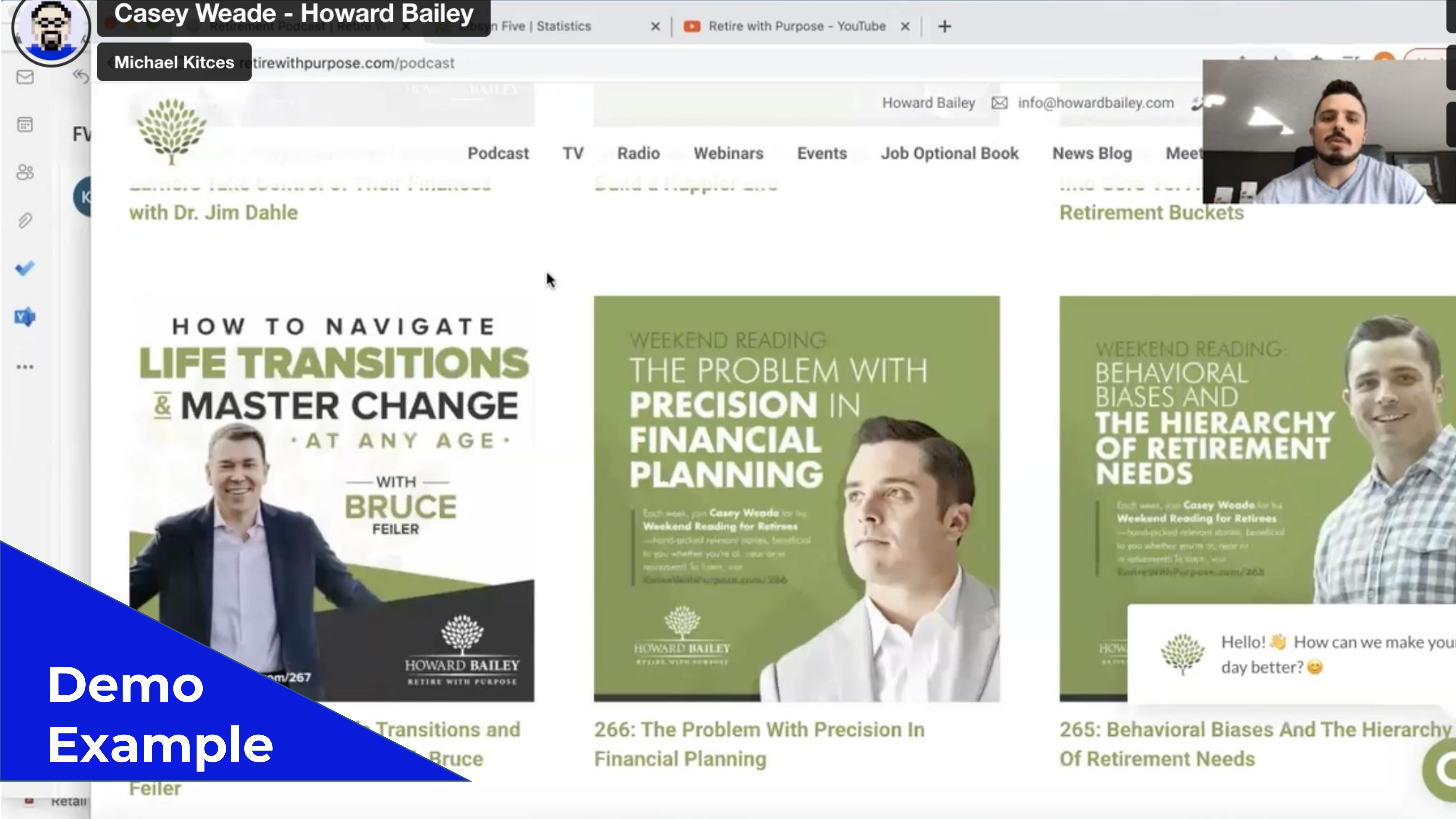
Examples:
- Annual Client Service Process
- Structured Onboarding Process
- Client Review-Meeting Workflow

Deliverable
A tangible document the client actually receives.

Examples:
- One-Page Financial Plan Template
- Recommendations Roadmap
- Prospect Proposal or Pitchbook
- Year-End Planning Summary

Script
The actual words used in specific, high-stakes client or prospect conversations.

Examples:
- Menu-of-Services Walkthrough
- Fee Proposal (or Increase) Conversation
- Annual Review Talking Points
- Discovery-To-Close Sales Script



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Michael Kitces
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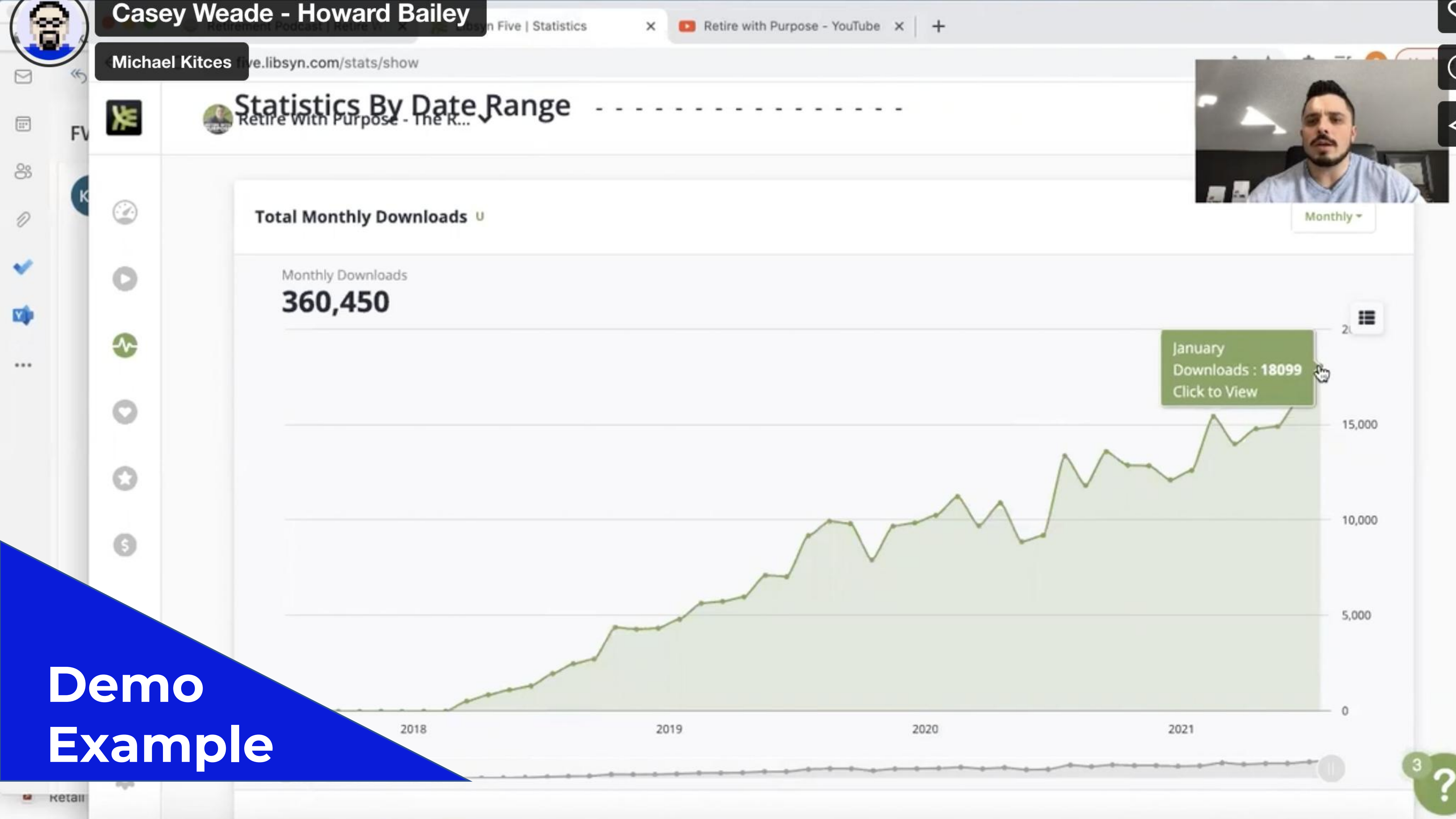
Demo
Example



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Michael Kitces
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Statistics By Date Range
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Total Monthly Downloads
Monthly
Monthly Downloads
360,450
January
Downloads : 18099
Click to View
15,000
10,000
5,000
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2021
Demo
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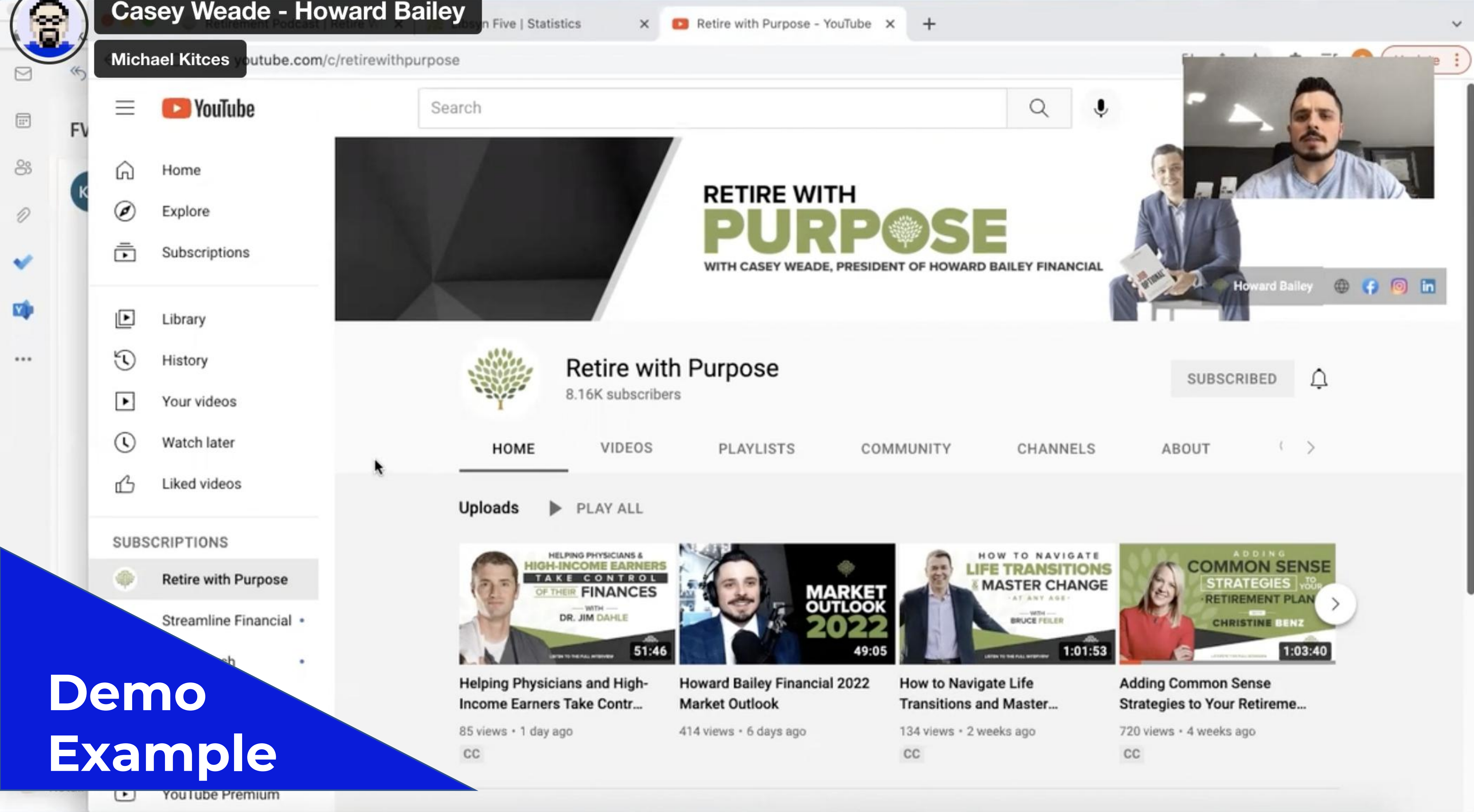
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HELPING PHYSICIANS & HIGH-INCOME EARNERS TAKE CONTROL OF THEIR FINANCES WITH DR. JIM DAHLE
51:46
MARKET OUTLOOK 2022
49:05
HOW TO NAVIGATE LIFE TRANSITIONS & MASTER CHANGE AT ANY AGE WITH BRUCE FEILER
1:01:53
ADDING COMMON SENSE STRATEGIES TO YOUR RETIREMENT PLAN WITH CHRISTINE BENZ
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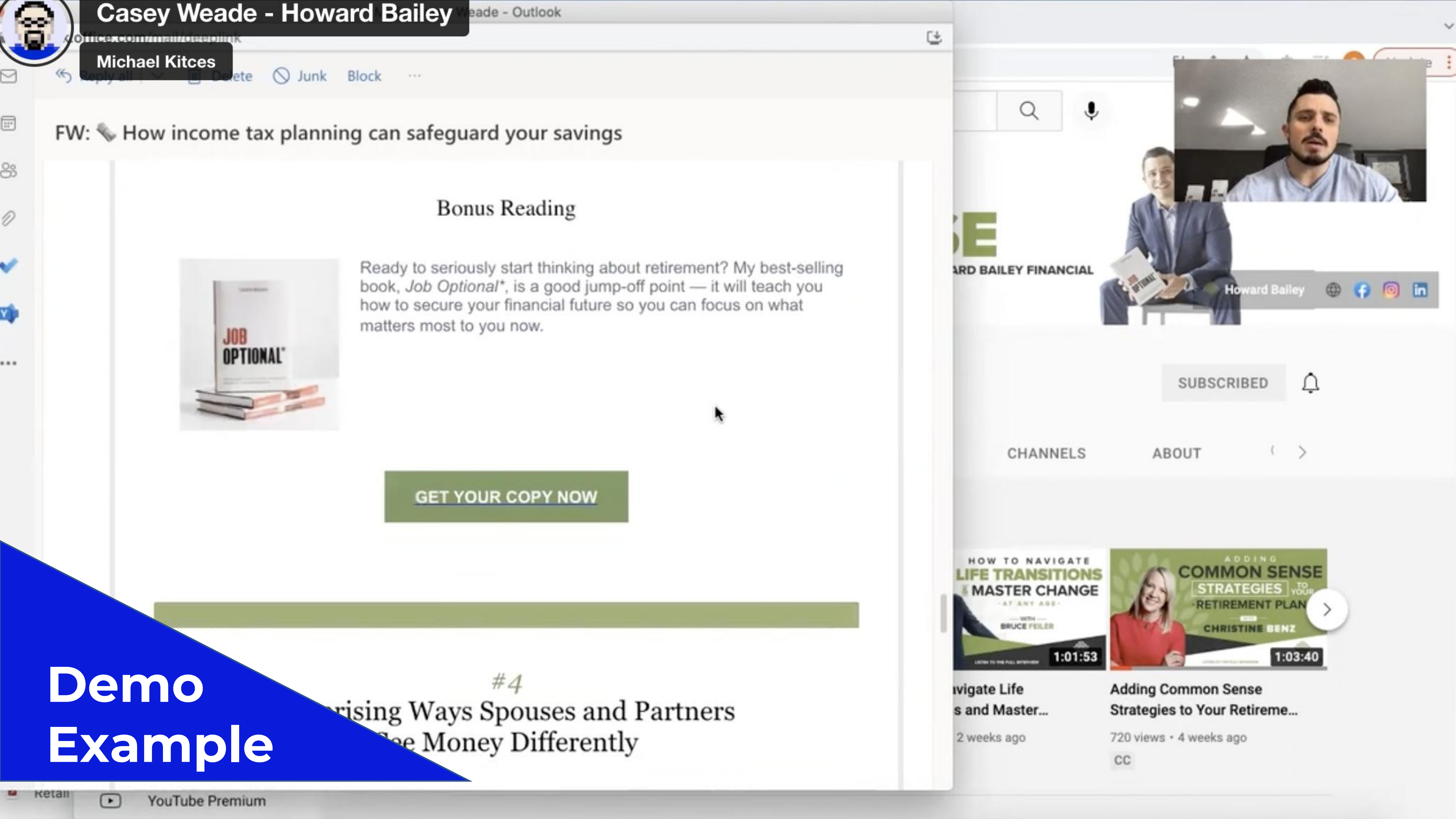
Casey Weade - Howard Bailey
Michael Kitces
Weade - Outlook
Delete
Junk
Block
FW: How income tax planning can safeguard your savings
Bonus Reading
Ready to seriously start thinking about retirement? My best-selling book, *Job Optional**, is a good jump-off point — it will teach you how to secure your financial future so you can focus on what matters most to you now.
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#4
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YouTube Premium
Demo Example

Summary

- Kitces Summits are paid speaking opportunities for you to give back to the profession and inspire other advicers
- You do not need to have experience as a public speaker to be a guest
- The next Summit on December 10, will feature advisors who are having success with demonstrating their value to prospects, new clients during onboarding and plan delivery, and to existing clients on an ongoing basis
- **Share your idea at *kitces.com/summit-presenters* by Monday, August 31**

Submit your idea by
Mon, Aug 31
11:59PM ET

Questions?

THANKS FOR JOINING US!

To apply, please visit
kitces.com/summit-presenters

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