

10 Years of Making It Possible



GRAB YOUR PASS TO



Your business. Your way.

XYPN LIVE voted “Best Charging-For-Planning Conference” by Kitces.com

"In the early days of financial planning, advisors were compensated for their advice by getting paid for the implementation – in the form of commissions on the various insurance and investment products they recommended to solve for the client’s goals and objectives...Over the decades since, more and more financial advisors have adopted models where they’re paid outright for their financial advice...

With a founding mission of expanding access to financial planning with ‘alternative’ fee-for-service pricing models, XY Planning Network’s annual conference – XYPN LIVE – has effectively become the largest gathering place of advisors charging fees for financial planning and trying to navigate all of the pricing and show-value challenges that advisors face with such business models.

In fact, the XYPN LIVE conference agenda is almost entirely focused on practice management content around pricing, growing, and scaling financial planning firms; advisors can navigate a full 3 days of practice management and solutions content, with sessions like “How to Hire, Manage, and Support a Growing Team”, “Streamline Operations and Workflows with your CRM”, “Do More Of What You Love: 5 Tasks To Outsource”, and “Delivering Exquisite Ongoing Client Care”.

Also notable at XYPN LIVE is its unique ‘Expo’ approach to its exhibit hall – where there are nearly 100 vendors, of which 90% are either service providers or technology vendors focused on making advice firms more efficient and scalable (as contrasted with most conference exhibit halls that are primarily populated with insurance and investment product distributors trying to distribute their products through advisors to get to their clients, instead of building solutions for advisors themselves)..." [Read More →](#)



Michael Kitces
**MSFS, MTAX, CFP, CLU,
ChFC, RHU, REBC, CASL**



Make plans to join us.



Passholder perks

Know what to expect at XYPN LIVE

98%

NETWORKING EVENT
SATISFACTION RATING

23

NETWORKING
SESSIONS ON THE AGENDA

700+

LIKE-MINDED
ATTENDEES

45

ATTENDEE-LEAD MEET-
UPS AT XYPN LIVE 2023

703

PARTICIPANTS IN 45
ATTENDEE-LEAD MEET-UPS

5,835

CONVERSATIONS IN
THE CONFERENCE APP



"It met me where I am in the buisness. I got exactly what I needed. I also attended and precon which is also valuable. Absolutely great to meet other advisors new and old and exchange ideas. Mentally restorative!!

Steve Underriter
**FREEDOM FINANCIAL PLANNING
SOLUTIONS (FFPS)**



Marking 10 Years

To celebrate, we’re creating an all-new conference schedule that puts your feedback front and center. It's all about you.

So, what’s coming to Minneapolis?

➔ DAY 1:

Dive right into the content experience with hand-picked content, workshops, & roundtables. You’ll close out day 1 with Opening Remarks and Welcome Reception

➔ DAY 2:

From walking the exhibit hall and hearing from your peers on how they use their tech, to practical exhibitor sessions, you’ll be able to do a little bit of everything. Wrap the day with all-new Supper Clubs.

➔ DAY 3:

One full day of practical, inspiring content, informal networking, and one awesome closing party will round out the 10th annual conference.

The one-day exhibit hall is the best way to “see who’s working on what problems” and find the solutions that let you see the possibilities.



Amy King
INSTAR FINANCIAL PLANNING

Interested in Pre-Cons?

Fly in the evening of October 14 or the morning of October 15. The choice is yours.

OCTOBER 15	OCTOBER 16	OCTOBER 17
Pre-Cons		
Opening Remarks		
Content Sessions		
Workshops		
Roundtables		
Welcome Reception	Networking Breakfasts	
	Keynotes	
	Exhibit Hall	Mastermind Lunches
	Tech Showcase	Closing Remarks
	Lunch & Learns	Closing Party
	AdviceTech Competition	
	Community Events	
	Alan + Michael Unhinged	
	Happy Hours	



Full-day finale
Join us for our Closing Party (location to be announced) to wrap the conference & fly out fresh faced on October 18th.

What's new in 2024?

XYPN LIVE is about you.

We're embracing our 10th anniversary and putting your feedback front and center to make XYPN LIVE 2024 even better.



Deeper dives into content

Walk away with tangible takeaways to implement into your business right away with all-new Workshops and Debrief Sessions.

More small group networking

Enjoy time with like-minded individuals with the new events making their way onto the schedule with Community Meet-Ups and Supper Clubs.

More time with the experts

We're shaking up coaching to create intentional time with team XYPN to help you get the right answers faster with Group Coaching & Q&A Sessions.

Even more on Exhibit Hall day

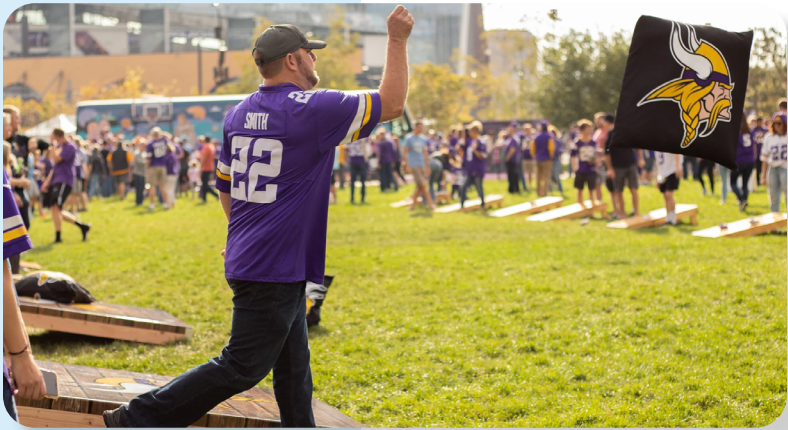
Get ready to peel back the curtain on the tools and tech your peers are using to run their firms, with the Tech Showcase and Exhibitor Sessions.

EXPLORE THE CITY

Minneapolis: Something for everyone



**Book by
September 25th
to lock in XYPN's
room rate of
\$239/night.**



Plan your trip

Get ready to meet us in Minneapolis

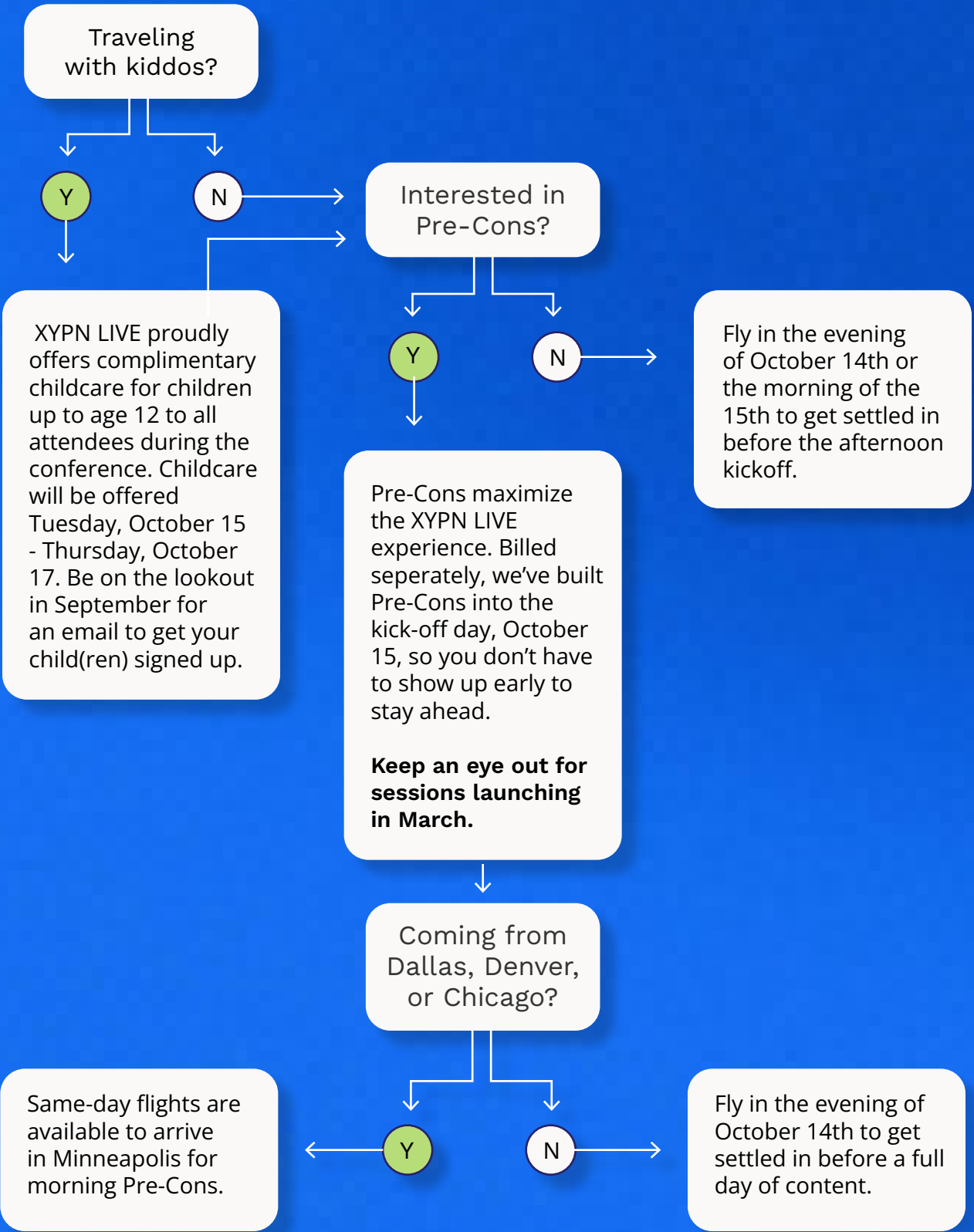


The highlight of XYPN LIVE 2023:

"Meeting other, like-minded professionals and seeing some of the people who inspired me to launch my firm even if they didn't know it."



Sara Zuckerman, CFP®,
CDFA®, MBA
RESET FINANCIAL PLANNING



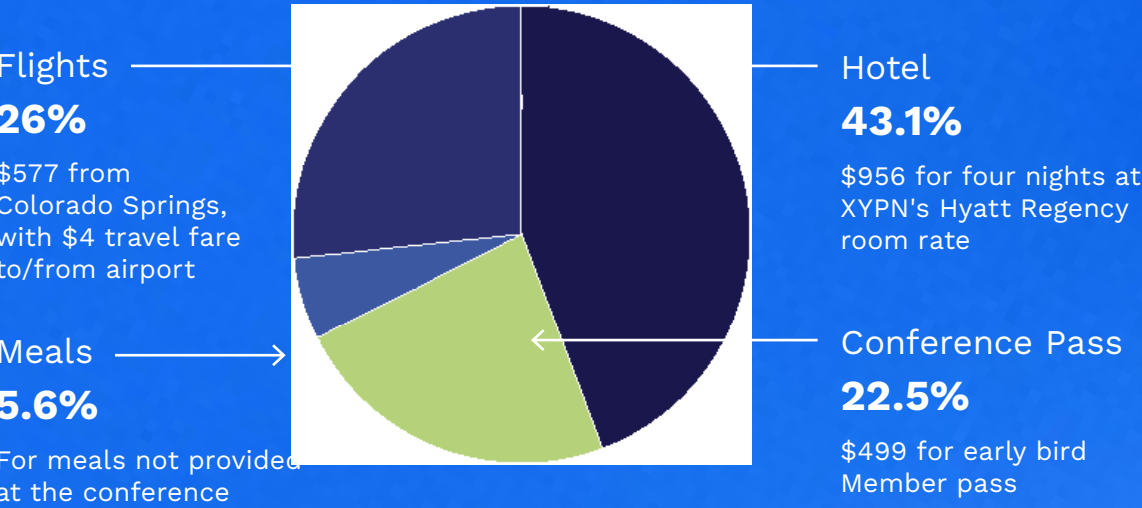
Budget breakdown

We get it, you're financial planners.

SAMPLE BUDGET PREPARED FOR XYPN TEAM MEMBER ARLENE MOSS:

Monday, October 14 from Colorado Springs, CO - Friday October 18

BUDGET ALLOCATION



Cash in on these savings

CONFERENCE PASS

- Part of a Member Firm: \$100 Discount
- Multi-Member Firm: \$50 Discount Per Person
- Firm Sending 3+ Attendees: \$50 Discount Per Person
- Full-Time Undergraduate Student: \$299 Pass

Member Pass
\$499
Final Price \$599

Non-Member Pass
\$699
Final Price \$799

XYPN LIVE speakers receive a complimentary conference pass. [Submit an application!](#)

HOTEL

- XYPN LIVE is coming to the Hyatt Regency Minneapolis for our 10th annual conference! Located just 20 minutes from Minneapolis-Saint Paul International Airport.

Book by September 25, 2024, to lock in XYPN's room rate
\$239 /night

FLIGHTS

- Have points? Put them to work. With our new schedule, fly in the evening of Monday, October 14, or the morning of Tuesday, October 15 without missing a beat and fly out the morning of October 18.
- The average price of an Uber from MSP to the Hyatt Regency is \$29. The Metro Blue Line? Just \$2 to take you the same distance.

MEALS

- 5 meals provided in Minneapolis. XYPN LIVE will provide breakfast and lunch on Wednesday and Thursday, apps at the Welcome Reception, and dinner at the closing party.

Keynote Speakers

[Read more →](#)



Libby Greiwe
THE EFFICIENT ADVISOR

Meet the Efficient Advisor Podcast host and XYPN LIVE 2024 keynote Libby Greiwe. She started her own financial planning business in 2004. And, over the years she scaled into a 7-figure single-advisor firm while working only 25 hours a week. Libbys keynote session, Advisor to CEO: How to Level Up by Thinking Like a Business Owner, shares what it takes to build a 100% referral-only practice.



Dr. Preston Cherry
CONCURRENT FINANCIAL PLANNING

Dr. Cherry is the Founder & President of Concurrent Financial Planning, Head of the Financial Planning Program, and Director of the Charles Schwab Center for Personal Financial Planning at the UW – Green Bay. Preston specializes in empowering individuals to share stories that inform their financial resources and life’s design to achieve financial wellness and freedom that cultivates life wholeness.



Michael Kitces & Carl Richards
KITCES.COM & BEHAVIOR GAP

Michael Kitces is a co-founder of the XY Planning Network, AdvicePay, New Planner Recruiting, fpPathfinder, and XY Bean Counters, the former Practitioner Editor of the Journal of Financial Planning, the host of the Financial Advisor Success podcast, and the publisher of Nerd's Eye view. Carl Richards is a dynamic international speaker and author, well known for his ability to simplify the most complex money ideas.

Meet First Wave Content Session Speakers:

We'll provide the resources— and connections—you need to build your dream firm, all under one roof. Keep an eye out for the full schedule dropping this summer.



Michael Reynolds

How to Build a Weekly "Content Marketing Machine"



Jason Howell

How to Prepare for 8-Figure Clients



Rebecca Conner

Tax Planning LIVE for Mid-Career Professionals



Stephanie Bogan

Right Sizing Your Client Base



Kristin Harad

Blueprint for Growth: Mapping Your Business Development



Libby Greiwe

Systems to Scale: How to Build a Killer Client Experience through the 7 Key Processes Every Practice Needs



Kate Guillen

The Ultimate Client Service Tech Stack

Add-On Content

Maximize Your XYPN LIVE Experience

Whether you arrive early and join Kinder for their 2-day pre-con on Sunday, October 13 - Monday, October 14, attend a half day pre-con on Tuesday, October 15, or stay late for Kinder's post-con on Friday, October 18, you have options.

Registration and payment for these events are handled directly through their organizers. All events are in addition to the main conference and are priced separately. These programs will not be recorded or available on demand.

Post-Con

AICCF

Advanced Education Planning Workshop

\$445 TO REGISTER

Join Scott Frank for a one-day seminar as he helps you feel more connected to the Life Planning community dedicated to building client-centered practices. This program highlights the latest teaching principles, lets you practice your life planning skills with colleagues, gives you opportunities for feedback from peers and trainers, and will reinvigorate your life planning practice (and life plan!).

Exclusively for Registered Life Planner® designees and EVOKE® Training grads

Pre-Cons

AICCF

Advanced Education Planning Workshop

\$895 FOR XYPN MEMBERS

Join Ross Riskin, Joe Messinger, and Alex Bottom for the Advanced Education Workshop.

Elements

Financial Vitals: Accelerating The Pace of Financial Advice

FREE TO ATTEND

Join Reese Harper, CFP®, Abby Morton, CFP®, Jordan Haines, CFP®, and Jeff Morgan in this session designed for advisors seeking to save time, enhance relationships, and differentiate themselves.

Kinder Institute

The Seven Stages of Money Maturity® Training

\$1,255 TO REGISTER

Join Mary Zimmerman and Scott Frank for this two-day course that dives into peoples' actual decision-drivers and unexamined biases toward money and teaches you to help them uncover their unexamined financial habits.

Limitless Advisor

How to Run (& Grow) Your Practice Like a Business

\$199 TO REGISTER

Join Stephanie Bogan and XYPN advisor Adam Cmejla, CFP® for a goal-crushing session teaching you how to create a growth engine that delivers a steady pipeline of new clients.

N2

Grow Your Business with Short-Form Video

\$125 TO REGISTER

Join Nate Hoskin & Nick Meyer, two of the most successful CFP® Professionals on social media.

SalesPro Insider

Collaborative Conversations That Convert

\$499 TO REGISTER

Join Nancy Bleeke Noël in this course focused on the key strategies for building collaborative sales skills.



Tools for the Modern Adviser



Two events, two dynamics.

The AdviceTech Competition spotlights brand-new advice-focused tech, while the Tech Showcase is your chance to see out-of-the-box ways to use the XYPN tech stack.

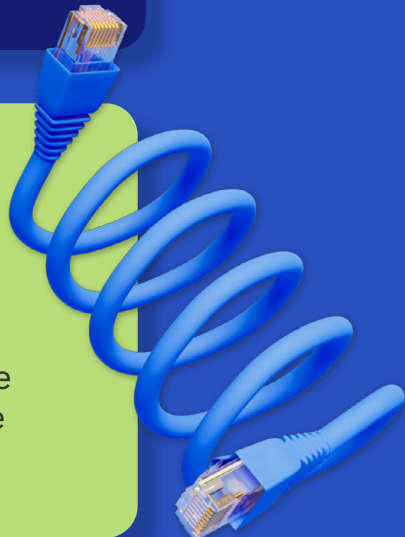


Exhibit Hall Day

Tech Showcase

See tech being used by other XYPN members.
in out-of-the-box ways

Want the 4-1-1 on tech integration? We know that it's hard to "stay ahead of the curve" when it comes to your tech. Staying up-to-date on the latest features and best practices is a pain point whether you have a firm of 1 or 100.

Take a look behind the curtain at the Tech Showcase to see what tech XYPN members are using to maximize their workflows & processes. At XYPN LIVE 2024, power users in the Network —those tech enthusiasts who've picked up tricks of the trade—are partnering with a select group of tech solutions to demo exactly how tech works best in their practices day-to-day.

AdviceTech Competition

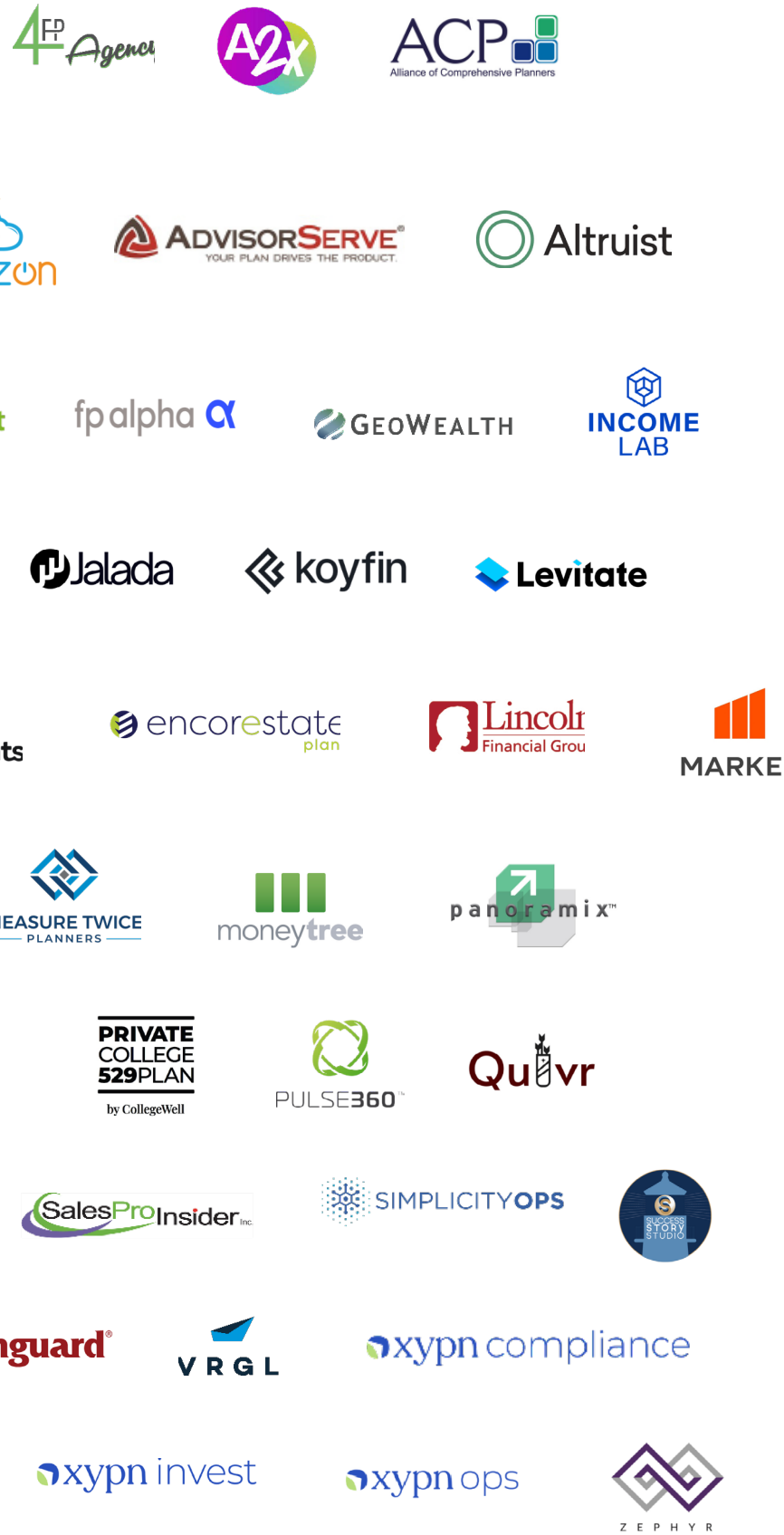
Be the first to see the latest in tech innovation

Merging the former FinTech Competition & AdvisorTech Expo in an all-new way, XYPN's AdviceTech Competition is all about the solutions that empower the modern "adviser."

For a large majority of advisors, the value of financial planning is ascribed to the products that they sell. But when the product of financial planning isn't advice, it's easy to see why investing in the advisor's value has become more of a checklist than a direct source of value.

"At its core, being a Financial Adviser means being someone who is first and foremost in the business of financial advice (not financial products)..." according to the [Kitces.com](https://www.kitces.com) "Financial Adviser Manifesto. The AdviceTech Competition's goal is to turn a spotlight on the tech and solutions that support real Financial Advisers and make delivering real financial more efficient, profitable, or impactful for clients.

WHO'S
EXHIBITING
AT XYPN
LIVE?



XYPN Partners
exhibiting at XYPN LIVE

Charles
Schwab

LLIS
The advisor's insurance advisor.®

Betterment
for Advisors

Capitact

Dimensional

eMoney

ORION
ADVISOR TECH

PreciseFP

RightCapital

Smartria

STARKWEATHER & SHEPLEY
INSURANCE BROKERAGE INC.

YourStake

Wealthbox



Join us in Minneapolis



GRAB YOUR PASS TO

