

10 Years of Making It Possible



GRAB YOUR PASS TO

 xyprn ► LIVE

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

700+

LIKE-MINDED
ATTENDEES

45

ATTENDEE-LEAD MEET-
UPS AT XYPN LIVE 2023

98%

NETWORKING EVENT
SATISFACTION RATING

23

NETWORKING
SESSIONS ON THE AGENDA

703

PARTICIPANTS IN 45
ATTENDEE-LEAD MEET-UPS

5,835

CONVERSATIONS IN
THE CONFERENCE APP



"It met me where I am in the business. 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 8-1:00 PM		
Workshops 1:30 PM Kick-Off		
Content Sessions		
Roundtables		
Opening Remarks 5 PM	Networking Breakfasts	
Welcome Reception	Keynotes	
	Exhibit Hall	Mastermind Lunches
	Tech Showcase	Alan & Kitces Unhinged 4 PM
	AdviceTech Competition	Closing Party 7-10 PM
	Community Events	
	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?

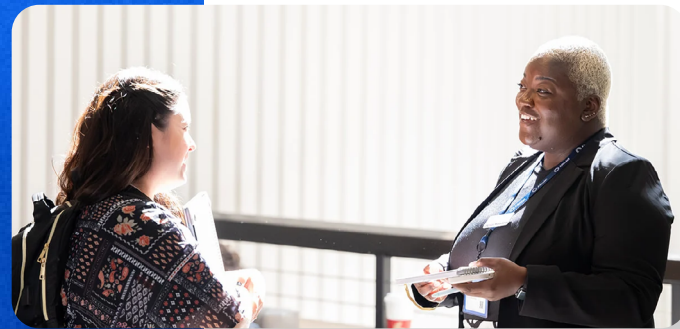
XYPN LIVE is about you.

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.

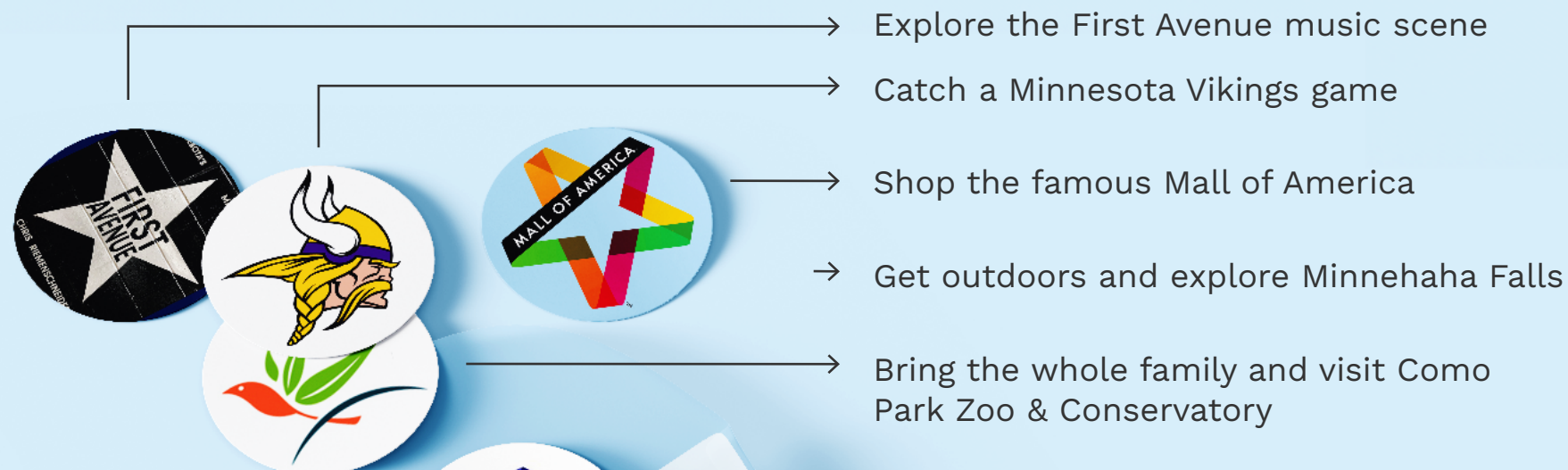


Even more on Exhibit Hall day

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



HYATT REGENCY

20 min to MSP airport

Grab Your Pass →

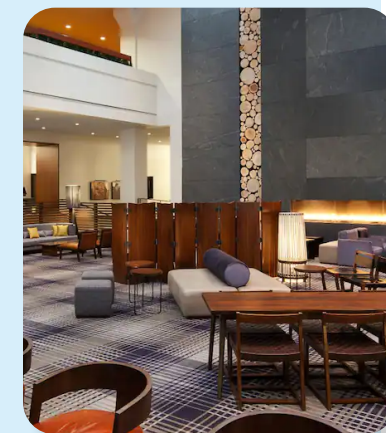
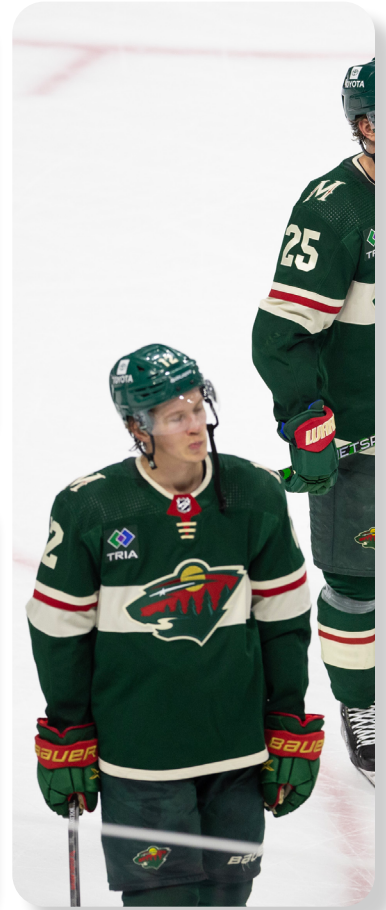
Make plans to join us

OCT 15-17
2024

Best Charging -For-Planning Conference



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



Plan your trip

Get ready to meet us in Minneapolis

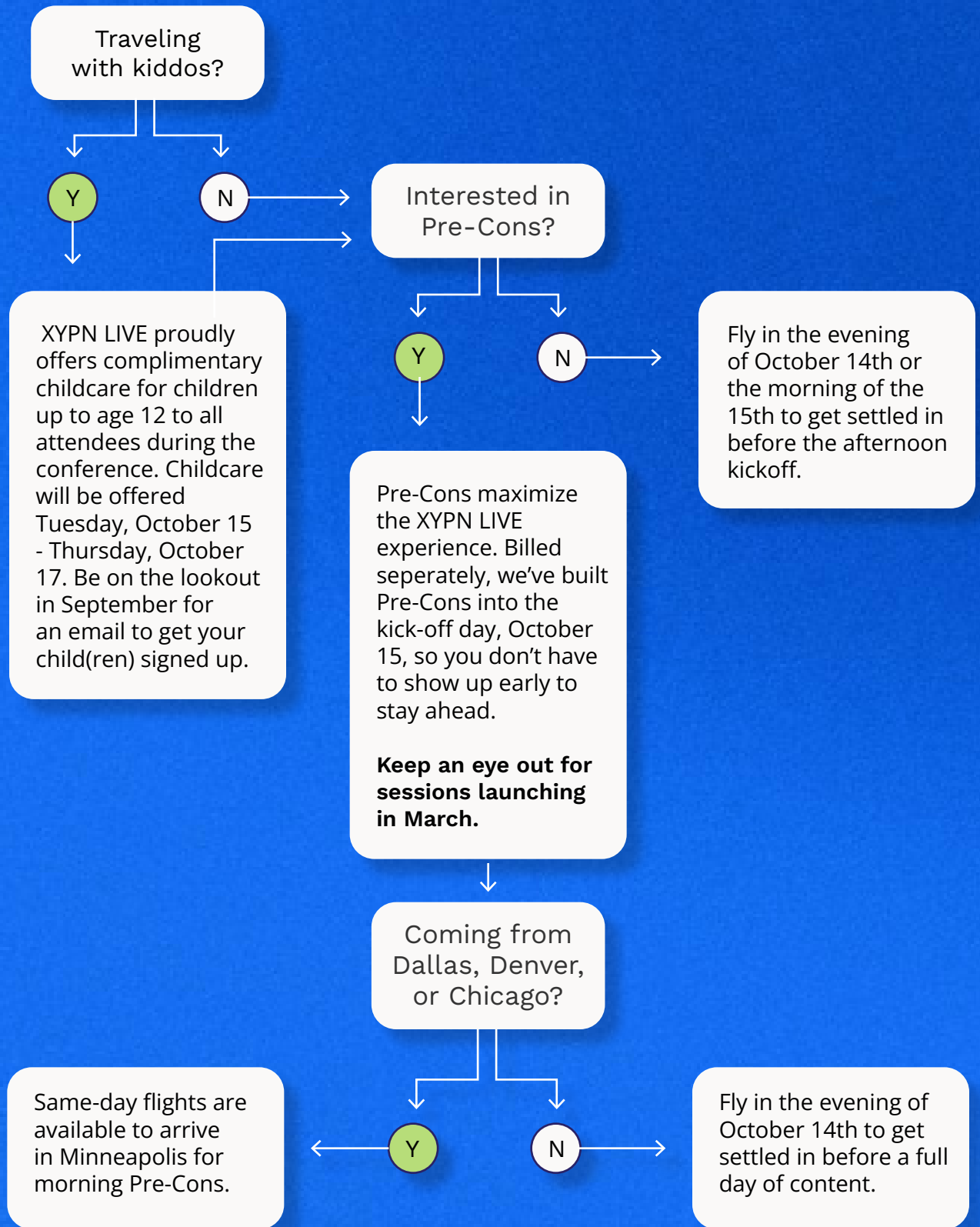


The highlight of XYPN LIVE 2023:

"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



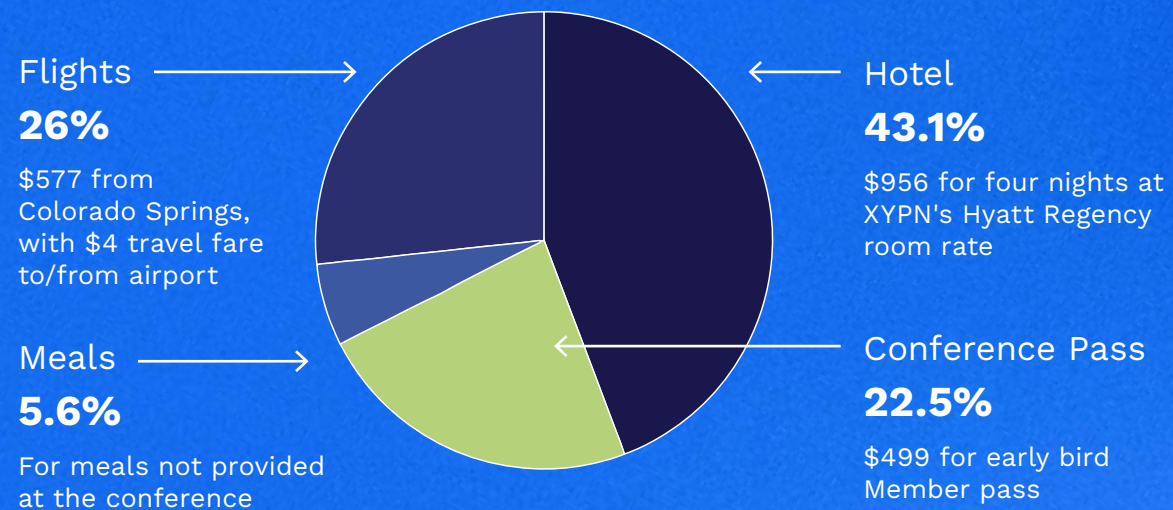
Budget breakdown

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.

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.

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.

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.

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.

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.

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.

Exhibit Hall Day



The Modern
Custodian
for
As

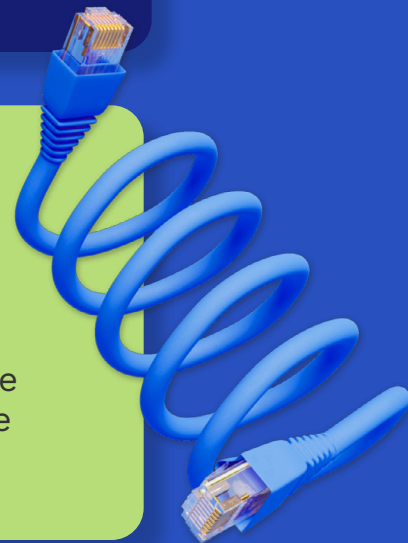


**Tools
for the
Modern
Adviser**



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.



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.

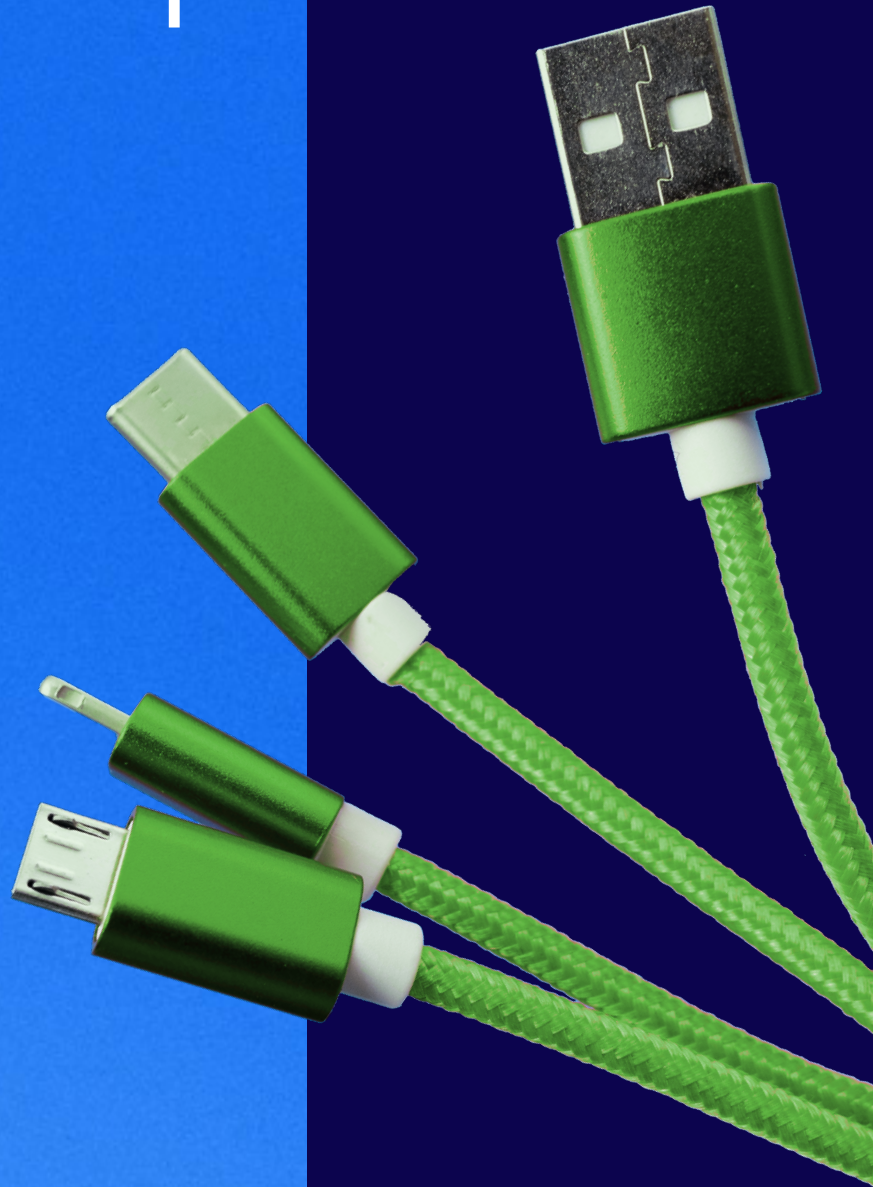
WHO'S EXHIBITING AT XYPN LIVE?



XYPN Partners exhibiting at XYPN LIVE



Join us in Minneapolis



GRAB YOUR PASS TO

 xyprn  LIVE