

# Future of Finance Summit 2027

*The future is now. Drive what's next.*

| DATES             | LOCATION                  | FORMAT              | EXPECTED ATTENDANCE | BOOK BY           |
|-------------------|---------------------------|---------------------|---------------------|-------------------|
| March 16–17, 2027 | M Social Hotel, Sunnyvale | Two days, in person | 100+                | February 19, 2027 |

## The opportunity

The leaders deciding what “next” looks like are spending two days together in Sunnyvale: CEOs, CFOs, CAOs, CAEs, and the finance and accounting executives running companies. Sponsoring the Future of Finance Summit puts you in that conversation, not adjacent to it.

This is a small, senior room by design. Every package includes time with attendees rather than a logo on a banner, and Gold and Platinum add an exhibit booth, the attendee list, and the reception and meals where the real conversations happen.

## Built for scale from day one

This is the inaugural Future of Finance Summit, and it's being built with a specific, committed room size rather than an open-ended hope for turnout.

Sponsors who commit this year are recognized as Founding Sponsors of the Future of Finance Summit.

## Who is in the room

|                                                                              |                                                                                         |                                                                                             |
|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <b>CFOs and CAOs</b><br>The people who own the budget and approve the spend. | <b>CEOs and CAEs</b><br>Setting direction for the function and the companies around it. | <b>Finance and accounting executives</b><br>Running the teams that evaluate, pilot and buy. |
|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|

These are budget holders, not researchers sent to gather brochures. If your product needs an executive sponsor to move, this is where you find one.

## Sponsorship levels

|                                                     | Silver            | Gold              | Platinum        |
|-----------------------------------------------------|-------------------|-------------------|-----------------|
| Sponsor fees                                        | \$3,500           | \$5,000           | \$8,000         |
| Complimentary registrations, including booth staff  | 1                 | 2                 | 3               |
| Logo on event page and in email promotions          | Included          | Included          | Included        |
| Verbal acknowledgment during the event              | As “all sponsors” | As “all sponsors” | By company name |
| Ad in conference eBook                              | Half-page ad      | Full-page ad      | Full-page ad    |
| Ad in the transition slides that play during breaks | Shared slide      | Full slide        | Full slide      |
| Meals, breaks and receptions with attendees         | Included          | Included          | Included        |
| Exhibit booth (6-foot table)                        | —                 | Included          | Included        |
| Attendee registration list (pre and post event)     | —                 | Included          | Included        |
| 60-second video to play during breaks               | —                 | —                 | Included        |
| Founding Sponsor recognition (2027 inaugural year)  | Included          | Included          | Included        |

### Silver — \$3,500

Visibility and access. One registration includes booth staff, logo on the event page and in email promotions, a half-page eBook ad and shared slide placement during breaks.

### Gold — \$5,000

Presence on the floor. Everything in Silver plus a second registration, a full-page eBook ad, your own transition slide, a 6-foot exhibit booth, the pre- and post-event attendee registration list, and a seat at the meals, breaks and receptions.

### Platinum — \$8,000

A voice in the program. Everything in Gold plus a third registration, verbal acknowledgment by company name, and a 60-second video during breaks.

## Add-on packages

---

Available to Silver sponsorships and above. Each is limited, and they go early.

| Add-on         | Investment | Availability | What it includes                                                                                                                                              |
|----------------|------------|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Curated dinner | \$2,000    | 3 available  | One-on-one time with attendees. CalCPA coordinates invites, promotion and registrations; the sponsor covers transportation, reservations, food and all costs. |
| Lunch sponsor  | \$3,000    | 1 available  | Company branding on table tents and signage at lunch.                                                                                                         |

## This year's agenda

---

Over two days, the Future of Finance Summit puts sitting CEOs, CFOs, CISOs and board members on stage to work through the decisions their organizations are making right now — how finance turns strategy into enterprise value, what generative AI has changed about the CFO mandate, how deepfakes and social engineering are breaking conventional controls, what boards expect from finance leadership, and how companies prepare for capital raises, acquisitions and exits. Every session is built around a buying decision your team cares about: technology investment, advisory services, risk and security, capital strategy, and talent.

## Why CalCPA

---

- The largest state CPA society in the United States. Showing up on our stage carries weight a cold outreach email never will.
- Seniority over volume. This summit is built for executives, so you spend your time with decision-makers instead of hunting for them.
- Time, not just exposure. Meals, breaks and receptions are part of the package — the hours where business actually gets done.

## Next step

---

Tell us the level you want, and we'll hold it. Commitments are due February 19, 2027, and the limited add-on goes to the first sponsor who claims it. [advertising@calcpa.org](mailto:advertising@calcpa.org)

California Society of CPAs, 500 Capitol Mall, Suite 1760, Sacramento, CA 95814. All advertising is subject to approval by the staff of the California Society of CPAs. The publisher reserves the right to decline any advertisement considered unethical or unsuitable, regardless of contract. If time permits, the advertiser may submit acceptable material as a substitute.