

NEWS

For immediate release

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Alliance of Comprehensive Planners Announces 2018 Tax-Focused Case Study Competition for College Students

*Winner will receive free registration to ACP's 2018
Annual Conference, plus airfare and accommodations at
Miami Marriott Biscayne Bay*

July 6, 2018 [WILMINGTON, DE] – The [Alliance of Comprehensive Planners \(ACP\)](#), a community of tax-focused financial planners who provide comprehensive planning strategies for their clients on a fee-only retainer basis, today announced details of the second annual ACP Tax-Focused Case Study Competition. This competition is designed exclusively for undergraduate students in personal financial planning programs registered with the [CFP Board of Standards](#). Each competing student will review the hypothetical scenario provided, including relevant background information, financial data and a hand-written tax organizer, then execute the tasks stated at the end of the case study packet.

“The ACP tax-focused case study competition provides an opportunity for students to apply knowledge they have learned in the classroom to a realistic financial planning scenario,” said [Steven Clark, CFP®, EA](#), Chair of the ACP Student Membership Committee heading up this year’s student competition. “They get to ‘do the work’ of financial planning rather than just read or watch how it is done by others. It is good practice in preparation for their future careers. For the winner, it is a great opportunity to attend the ACP 2018 Annual Conference in Miami, where they will get to mingle with experienced practitioners and attend numerous educational sessions – yet another way to gain real world experience.”

“The financial planning profession as a whole also benefits from student participation in case study competitions. By engaging students and encouraging them, we strive to keep them excited about the profession and to help improve their skills. Future hiring firms and the public will benefit from better-prepared college graduates who are excited about the work they are doing.”

COMPETITION RULES

Only one student may be named as the submitter, however, there is no limit to the number of students from any particular CFP-registered program. All participating students must be enrolled in an undergraduate degree program registered with the CFP Board of Standards as of the first day of their program’s Fall 2018 semester. Students who are in a Master’s Degree or “graduate program” are disqualified from entering. Students are prohibited from seeking advice from professionals or persons not participating in the competition. Furthermore, use of industry-specific professional software is prohibited; this includes but is not limited to tax-preparation software and financial planning software. It is important to note that any IRS materials used should be from the 2017 tax year.

Competition materials can be found at:

<https://community.acplanners.org/viewdocument/competition-materials>

Submissions, which are due by September 16, 2018 at 11:59 pm ET, should be sent to:

MaryKate@ACPlanners.org

A PDF with competition details can be found at:

[Case Study Competition Announcement.pdf](#)

REVIEW PROCESS

Submissions will be reviewed by a committee of tenured ACP members beginning Sept. 17, 2018 and concluding on Oct. 7, 2018. The winner will be announced Oct. 8, 2018.

The winner of this competition will receive:

1. One free registration to attend the ACP 2018 Annual Conference in Miami, Florida, November 6-9 2018
2. Round-trip coach airfare up to \$500
3. Three nights hotel accommodations (November 6 -9) for one person at the 2018 Annual Conference hotel (Miami Marriott Biscayne Bay)

2018 ACP ANNUAL CONFERENCE

This year’s annual conference will be held Nov. 6-9, 2018 at the Miami Marriott Biscayne Bay (“the Bridge to Everything Miami”). The Marriott is in the heart of downtown at the intersection of the Miami Arts and Design districts. Bright, airy rooms and suites offer restful views of the Biscayne Bay Marina and downtown Miami from private balconies.

[George Kinder](#), founder of The Kinder Institute of Life Planning, and [Marie Swift](#), founder of Impact Communications, will keynote at this year's event. While the full agenda is not yet available, preliminary information is available here: <http://2018.acplanners.org/home>

George Kinder will be leading his signature "Seven Stages of Money Maturity" workshop on Nov. 5 and 6, 2018 (as a pre-conference option being offered the two days immediately preceding the ACP Annual conference. More information is available here: <http://2018.acplanners.org/kinder-2-day-workshop>

Companies interested in sponsoring the ACP Annual Conference will find more information here: <http://2018.acplanners.org/sponsors>

ABOUT THE ALLIANCE OF COMPREHENSIVE PLANNERS (ACP)

The Alliance of Comprehensive Planners (ACP), formerly Alliance of Cambridge Advisors (ACA), is a community of tax-focused financial planners who provide comprehensive planning strategies for their clients on a fee-only retainer basis. ACP members are required to maintain the CFP® or CPA/PFS (or equivalent) designation, complete ACP's rigorous training program, and meet some of the highest continuing education requirements in the industry. To learn more about this fiduciary network or to find a certified ACP member, visit www.ACPlanners.org.

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