

ELITE

VIRTUAL FAMILY OFFICE

COLLECTIVE

*Conference designed for Growth Minded
Advisors & Accountants.*

Sponsorship Opportunities



Who We Are

Elite Resource Team is a transformative community of advisors and CPAs dedicated to redefining client service through proactive, collaborative partnerships. By integrating a Virtual Family Office model, we empower financial professionals to deliver advanced tax planning, wealth management, and strategic advisory solutions, typically reserved for ultra-high-net-worth clients.

Our unique approach equips advisors and accountants with the tools and expert connections needed to elevate their practices and foster significant client growth—making us an ideal partner for sponsors committed to innovation and impact in the financial industry.

What is the Elite VFO Collective?

The Elite Virtual Family Office Collective is a high-impact, two-day event created to elevate Financial Advisors and Accountants through actionable insights, advanced strategies, and access to influential industry leaders.

Featuring expert presentations and panel discussions across the five core disciplines of a Virtual Family Office—Tax Planning, Legal, Wealth Management, Risk Mitigation, and Business Advisory—attendees gain tools to build resilient, high-growth practices. This immersive experience empowers participants to strengthen client relationships, form strategic alliances, and scale their practices while honing their leadership skills.

Details About Elite VFO Collective

- June 26th & 27th, 2025 **Fusion Mastermind Day June 25th, 2025*
- Westin San Diego - Gaslamp - 910 Broadway Cir, San Diego, CA 92101
- 250-300 Attendees expected
- 15-20 Sponsorship Tables & Speaking Spots Available

Who is Our Audience?

- 50% Financial Advisors & Insurance Agents & 50% Accountants & Enrolled Agents.
- 90% firm owners, proactive planners, focused on serving business owners and high net worth clients.

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Sponsorship Packages

		SILVER	GOLD	PLATINUM
<i>Pre-Event</i>	Company Logo on All PR & Marketing Communications	✓	✓	✓
<i>Pre-Event</i>	Designated Recognition Post in Skool VFO Community	✓	✓	✓
<i>Pre-Event</i>	Announcement on Weekly Collaboration Calls	✓	✓	✓
<i>Pre-Event</i>	Description of Company on Elite VFO Collective Website	✓	✓	✓
<i>Pre-Event</i>	Social Media Card for Event Promotion within Your Community & on Social Media	✓	✓	✓
<i>Pre-Event</i>	Referral Discount Price for Event Promotion	✓	✓	✓
<i>Pre-Event</i>	Podcast Interview or Special Guest Spot on Monday Case Call		✓	✓
<i>Pre-Event</i>	Promotional Marketing Email Announcing Sponsorship			✓
<i>During Event</i>	Company Logo on Event Tables & Agenda	✓	✓	✓
<i>During Event</i>	General Admin Attendance at VFO-Collective including Meals (06/26 & 06/27)	✓	✓	✓
<i>During Event</i>	Sponsorship Table for Thursday/Friday General Sessions (06/26 & 06/27)	✓	✓	✓
<i>During Event</i>	Keynote Recognition: Verbal Acknowledgment During Opening and Closing Keynotes		✓	✓
<i>During Event</i>	Speaker in Breakout Room (Approval Required)		✓	
<i>During Event</i>	Speaker on Main Stage (Approval Required)			✓
<i>During Event</i>	Logo Prominently Displayed on All Event Materials			✓
<i>During Event</i>	Mastermind Attendance for Wednesday Session including Meals (06/25)			✓
<i>During Event</i>	Sponsorship Table for Mastermind Wednesday Session (06/25)			✓
<i>During Event</i>	Mastermind Attendance for Wednesday Cocktail Hour (06/25)			✓
<i>During Event</i>	Sponsorship Table Space: Premier Exhibit Space at the Event of Your Selection			✓
<i>During Event</i>	Complimentary Event Passes (Including Mastermind Day)		1	3
<i>Post Event</i>	Recording of Presentation		✓	✓
<i>Post Event</i>	5 Action Photo Shots on Stage		✓	✓
<i>Post Event</i>	Full Attendee List with Email Addresses			✓
		\$2,500	\$5,000	\$10,000

A La Carte Options (During Event)

Designated Meals	
<i>Fusion Mastermind Day - Breakfast</i>	\$1,000
<i>Fusion Mastermind Day - Lunch</i>	\$1,000
<i>Fusion Mastermind Day - Happy Hour</i>	\$5,000
<i>General Session Day 1 - Breakfast</i>	\$1,500
<i>General Session Day 1 - Lunch</i>	\$1,500
<i>General Session Day 1 - Happy Hour (All Attendees)</i>	\$7,500
<i>General Session Day 2 - Breakfast</i>	\$1,500
<i>General Session Day 2 - Lunch</i>	\$1,500
<i>Mastermind Speaker (6/25 with approval)</i>	\$7,500
<i>Accredited Members & Guests Dinner</i>	\$10,000

For More Information Contact
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