

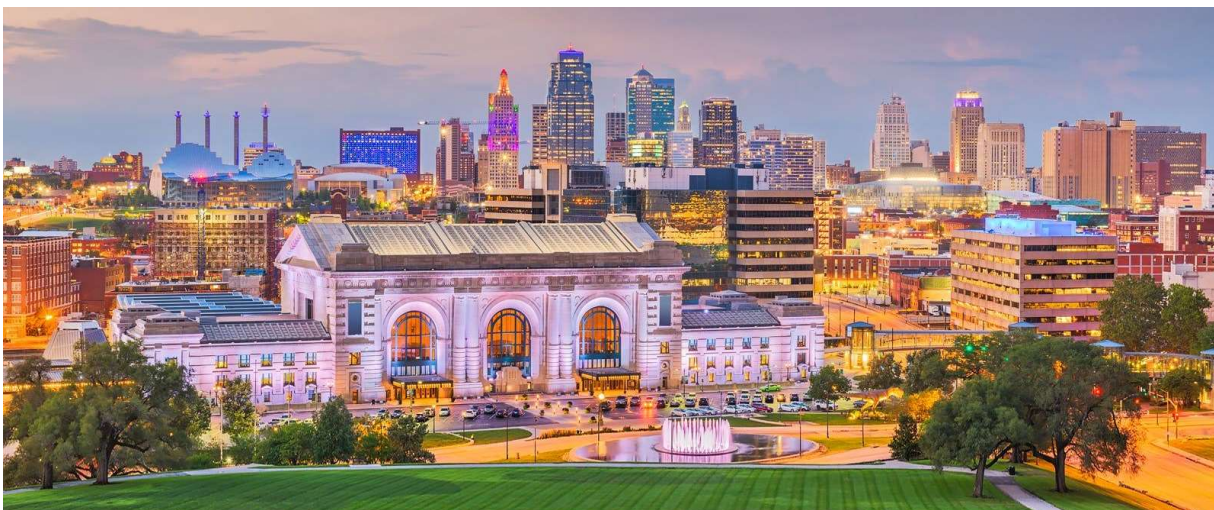


HEADWATERS LEADERSHIP CONFERENCE

2027 Sponsor Prospectus

Kansas City, Missouri

JULY 15-16, 2027



**Connect with the people shaping the future of
accounting firms.**

HeadWaters gives a limited group of sponsors meaningful access to senior accounting firm leaders in a setting built for practical learning, candid conversation, and lasting relationships.

120+

expected attendees

12

sponsorships available

1

sponsor per product or service
category*

<https://upstreamacademy.com/headwaters/>

Why Sponsor HeadWaters?

A focused, relationship-first experience for organizations serving accounting firms



HeadWaters is Upstream Academy's annual leadership conference for accounting firm leaders. Unlike conferences centered on technical updates, HeadWaters focuses on innovation, personal and professional growth, firm leadership, and the real challenges shaping the profession.

Sponsors participate as part of the conference community. Meals, breaks, the reception, and conference sessions create repeated opportunities to listen, learn, and build relationships with people who influence firm direction and purchasing decisions.

A RELATIONSHIP-RICH FORMAT

The event is intentionally designed for meaningful interaction rather than hard selling.

You will have the chance to interact during sessions and be introduced before the event to ensure attendee recognition.

LIMITED COMPETITION

Only 12 organizations may sponsor, with one sponsor accepted per product or service category.*

*Upstream will do our best to maintain diverse sponsorships, with the understanding that some sponsors may provide a wide array of services

A Proven Audience

60+ firms in attendance	47% of firms send an executive	69% of attendees are in leadership	30+ states and territories represented
17% over \$100 million annual revenue	29% \$25-100 million annual revenue	28% \$10-25 million annual revenue	26% \$10 million and under annual revenue

Firm-size figures are broad estimates intended to describe the audience and should not be interpreted as audited financial information.

The Sponsor Experience

Visibility before the event, recognition on site, and time with attendees throughout the conference



Exclusive by Design

HeadWaters accepts only one sponsor in each product or service category, so every organization has room to stand out. Upstream Academy has final authority to determine category overlap. Returning sponsors receive an early renewal window before opportunities are made broadly available.

A Community-Focused Conference

HeadWaters is designed for conversation, shared learning, and long-term relationship-building. Sponsors are encouraged to participate in sessions, meals, breaks, and social events as members of the conference community. Activities that draw attendees away from scheduled programming are not permitted.

Attendee Information

The attendee list includes name, company, title, and email address, subject to attendee privacy and consent requirements. Sponsor representatives may use the list for thoughtful, relevant follow-up. Attendees should not be added in bulk to a general marketing list without their permission.

2027 Sponsorship Levels

Twelve total sponsorships are available, subject to category approval



FEATURE	PLATINUM	GOLD	SILVER
Investment	\$15,000	\$10,000	\$6,000
Availability	2	3	Subject to total cap
Sponsor representatives	3	2	1
Exhibit table	6-ft table	6-ft table	6-ft table
Table placement	First selection	Second selection	Assigned
Advertisement	Full page	Half page	—
Company logo & description	Attendee materials & website	Attendee materials & website	Attendee materials & website
Dedicated sponsor spotlight	Included	—	—
Recognition in attendee email	Included	Included	Included
Sponsored experience	Premium option	Standard option	—
Podcast Ad	Included	Included	
Wi-Fi and power	Guaranteed	As available	As available
ELA Conference Attendance	Included	Add-on available for \$2500	—

Exhibit Space

Sponsors receive one six-foot draped display table with chairs and room for one retractable banner. Platinum selects first, followed by Gold sponsors in order of acceptance. Silver locations are assigned by Upstream Academy.

One additional sponsor representative may be added to any eligible sponsorship for \$1,000 (maximum 3 sponsor representatives).

Level Details

Choose the level that best matches your goals for access, visibility, and engagement



PLATINUM \$15,000 Two available	• Three sponsor representatives and prime exhibit placement • Full-page advertisement in attendee materials • Dedicated sponsor spotlight in socials and email • “Sponsored by” signs and recognition at one premium sponsored experience: lunch or reception • Dedicated company slide displayed onscreen during scheduled breaks • Guaranteed Wi-Fi and power access • Attendance at our May Emerging Leaders Conference • All silver inclusions
GOLD \$10,000 Three available	• Two sponsor representatives and preferred exhibit placement • Half-page advertisement and enhanced onsite signage • One standard sponsored experience: breakfast, conference-table giveaway, or scheduled break • All silver inclusions Attendance at our Emerging Leaders Conference in May is available for an additional fee
SILVER \$6,000 Available within 12-sponsor cap	• One sponsor representative and an assigned exhibit table • Company description and logo in conference materials and on the HeadWaters webpage • Sponsor recognition at the start of the conference • Recognition in an attendee email • Access to all conference sessions except the discussion forums • Reception attendance

Emerging Leaders Conference

Platinum sponsors (and Gold sponsors who choose to upgrade) are invited to attend our Emerging Leaders Conference on May 4-5, 2027 in Austin, TX. This 1.5 day conference is the conclusion of our 2-year ELA program for new partners. We expect approx. 65 emerging leaders in attendance.

Featured Experiences & Next Steps

Sponsor the moments where HeadWaters conversations naturally happen



Sponsored Conference Experiences

PLATINUM PREMIUM OPTIONS • Lunch sponsorship • Reception sponsorship	GOLD STANDARD OPTIONS • Breakfast sponsorship • Branded giveaways available at registration • Scheduled break sponsorship
HOW RECOGNITION WORKS Sponsored experiences include recognition in the conference agenda, onsite signage at the sponsored activity, and verbal acknowledgment during the conference. Additional branded elements will be coordinated after acceptance.	APPROVAL & AVAILABILITY All experiences are subject to availability, venue requirements, and Upstream Academy approval.

Reserve Your Sponsorship

1 REVIEW Select the sponsorship level and sponsored experience that best supports your goals.	2 APPLY Complete the sponsorship application. https://www.surveymonkey.com/r/sponsor-app-2027	3 CONFIRM Upstream Academy will confirm category availability, acceptance, and next steps.
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Important Dates and Contact

Application deadline	Applications accepted through June 1, 2027, or until all sponsorships are filled.
Sponsorship availability	Twelve total sponsorships; only one sponsorship in each product or service category. Upstream has final authority to determine category overlap.
Application	Apply here
Questions	Kate Cummings 406-495-1850 katec@upstreamacademy.com