

# AGENDA 2020 Spring Summit

EDUCATION TRACK  
(CLE ELIGIBLE)

PRACTICE MANAGEMENT  
AND MARKETING TRACK

TECHNOLOGY TRACK

**Tuesday, April 21–Wednesday, April 22**

**We will begin promptly at 7:00am PST / 10:00am EST on both days**

## **BOOT CAMP TO SUCCESS\***

**Creating a Purpose and Profit-Driven Practice  
with Academy Co-Founders Robert Armstrong and Sanford M. Fisch**

- 1. Strategic Planning System—Brief Overview\*\*:**  
Aligning Your Business with Your Personal Values
- 2. Finance and Operations Management System:**  
Managing by the Numbers
- 3. A Systems Approach to Leadership:**  
Creating a Firm Culture, Focusing on Unique Abilities and the Road to Mastery
- 4. Staff Accountability and Team Building System:**  
Putting the Right People with the Right Skills in the Right Positions
- 5. Comprehensive Technology System:**  
Leveraging Online and Offline Tools to Draft Documents and Manage Your Firm
- 6. Integrated Marketing and Public Relations System:**  
Multiple Marketing Activities Generating an Endless Supply of Qualified Prospects
- 7. No Stress Client Engagement System:**  
Predictably Inspiring Consumers to Take Action and Retain Your Firm
- 8. Efficient Workflow System:**  
Drafting, Reviewing and Executing State-of-the-Art Estate Plans
- 9. Continuing Legal Education System:**  
Staying on the Cutting Edge of Effective Legal Strategies
- 10. Ancillary Business Systems:**  
Leveraging Client Relationships to Generate Multiple Sources of Revenue
- 11. Ongoing Mastermind System:**  
Structures to Participate in a Community of Like-Minded Attorneys

\* **Boot Camp is for VIP Guests only**

\*\* **Prerequisite for Boot Camp. Attendees must bring their completed Strategic Planning Worksheet.**  
To review the eLearning Training Courses on Strategic Planning and download the Strategic Planning Worksheet,  
Members go to [members.aeapa.com/strategicplanning](https://members.aeapa.com/strategicplanning) | VIP Guests please email [information@aeapa.com](mailto:information@aeapa.com)

# Thursday, April 23

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## SPRING SUMMIT 2020—MAIN SESSIONS

**7:00am–8:00am PST**

**Welcome and Opening Ceremony**

**Speakers:** Robert Armstrong and Sanford M. Fisch

**8:00am–9:00am PST**

**Founders Message**

**Speakers:** Robert Armstrong and Sanford M. Fisch

**9:00am–9:30am PST—BREAK**

**9:30am–11:30am PST**

**Marketing Roundtable**

**Facilitators:** Practice Building Coaches

**11:30am–Noon PST—BREAK**

### MAIN SESSIONS

**Noon–1:00pm PST**

**Planning for Clients Without a Taxable Estate**

**Speaker:** Steve Hartnett

**1:00pm–2:00pm PST**

**Basics of Medicaid Planning:  
CSRA, MMMNA, DRA, and Other Terms and  
Strategies You Need to Know**

**Speaker:** Steve Hartnett

### BREAKOUT SESSIONS

**Noon–2:00pm PST**

**Why Your Online Presence Is More Important  
Now Than Ever**

**Speaker:** Rita Chaires

**2:00pm–2:30pm PST—BREAK**

**2:30pm–3:30pm PST**

**Thursday Night Roundtable: Handling Signings in the COVID-19 Era**

**Facilitators:** Practice Building Coaches and Member Panel

# Friday, April 24

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## MAIN SESSIONS

**7:00am–9:00am PST**

**Estate Planning for Retirement Benefits After SECURE: The New Planning Landscape and What to Do with Existing Plans... Plus CARES! Meet the 2020 Suspension of RMDs and Virus Related Distributions**

**Speaker:** Natalie Choate, Esq.

## BREAKOUT SESSIONS

**7:00am–9:00am PST**

**Pre-Qualifying Prospects for Consultations**

**Speakers:** Practice Building Coaches

## 9:00am–9:30am PST—BREAK

**9:30am–10:30am PST**

**IRA Mistakes and How to Fix Them**

**Speaker:** Natalie Choate, Esq.

**10:30am–11:30am PST**

**Can You Roll Over in Your Grave?**

**Speaker:** Natalie Choate, Esq.

**9:30am–11:30am PST**

**You Pick!**

We've hosted 7 great webinars in the last 4 weeks. Pick the topic you haven't had a chance to listen to yet

## 11:30am–Noon PST—BREAK

**Noon–12:30pm PST**

**How You Can Help Clients and Prospects Handle COVID-19 Health Matters**

**Speaker:** Randi Siegel, DocuBank

**Noon–1:00pm PST**

**Lean Six Sigma Basic Introduction**

How lean is your business running? Learn the basic principles of Lean Six Sigma, a process improvement methodology that focuses on identifying and removing waste or inefficiencies in a process to improve your workflow.

**Speaker:** Prakash Sharma

## 1:00pm–1:30pm PST—BREAK

**1:30pm–3:00pm PST**

**Missed Opportunities in Your Law Firm**

**Speakers:** Robert Armstrong and Sanford M. Fisch

## 3:00pm–3:30pm PST—BREAK

**3:30pm–4:30pm PST**

**Success Stories**

**Facilitator:** Robert Armstrong

## 4:45pm PST—VIRTUAL HAPPY HOUR

# Saturday, April 25

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## MAIN SESSIONS

**7:00am–8:45am PST**

**Is Any Trust Really Irrevocable Anymore: All About Decanting**

**Speaker:** Susan Bart, Schiff Hardin LLP

**8:45am–9:15am PST—BREAK**

**9:15am–10:30am PST**

**Not Your Parents' Estate Plan: Planning Considerations for Next Gen Clients**

**Speaker:** Matthew E. Brady, J.D. Regional Managing Director at Wells Fargo

**10:30am–11:00am PST—BREAK**

**11:00am–12:15pm PST**

**Financial Database Meeting**

Only participating Members (and spouses) who submitted their financials by the deadline and new Members who received a guest pass from their PBC may attend

**Speakers:** Practice Building Coaches and Member Panel

**12:15pm–12:45pm PST—BREAK**

**12:45pm–2:45pm PST**

**Quiz Show: Solutions to Common Estate Planning Questions**

**Speaker:** Steve Hartnett

# Sunday, April 26

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## MAIN SESSIONS

**10:00am–Noon PST**

**SECURE Act and Medicaid  
Open to All Academy Members!**

**Speaker:** Dave Zumpano, Lawyers with Purpose

**Noon–12:15am PST—BREAK**

**12:15pm–1:30pm PST**

**Medicaid Crisis and Pre-Planning Opportunities in the Age of Covid19  
Open to All Academy Members!**

**Speaker:** Dave Zumpano, Lawyers with Purpose

**END OF 2020 SPRING SUMMIT**