

AGENDA

2022
SPRING
SUMMIT

Welcome to Austin, Texas

Thursday, May 12

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

9:00am–11:00am

Building an Experience Based Business

Speaker: Alex Ash, Matson Money

10:30am–12:30pm

VIP and New Member Meet & Greet

*Invitation Only. Our VIP Guests and Newest Members get an opportunity to connect prior to the Summit.
This session is intended only for guests and Members who have joined since the 2021 Fall Summit.*

SPRING SUMMIT 2022—MAIN SESSIONS

First Seat Free, Additional Seats \$525

Late Registration/Cancellation Fee: \$225 per seat after registration closes

1:00pm–2:15pm

Welcome and Opening Ceremony

Join Academy founders Robert Armstrong and Sanford M. Fisch as we kick-off the Spring Summit!

Speakers: Robert Armstrong and Sanford M. Fisch

2:15pm–3:00pm

Founders' Message

Robert Armstrong and Sanford M. Fisch have been innovating the legal industry since before the Academy was founded 29 years ago. This session is an opportunity to hear from these visionaries as they set the stage for your business in 2022 and beyond.

Speakers: Robert Armstrong and Sanford M. Fisch

3:00pm–3:30pm—BREAK

3:30pm–5:00pm

Keynote Session: Embracing Future Changes

Keynote Speaker: Doug Hanson, *Employee Engagement Expert*

6:30pm–9:00pm Cocktail Party and Dinner

Friday, May 13

EDUCATION TRACK (CLE ELIGIBLE)

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MAIN SESSIONS

8:00am–10:00am

**Building Block of Blockchain: Planning with
Cryptocurrency for Estate Planners**
(CLE Eligible Session)

Speakers: Abigail Earthman and Bri Loughlin, *Winstead PC*

BREAKOUT SESSIONS

8:00am–10:00am

Marketing Roundtable

Facilitator: Practice Building Coaches

10:00am–10:30am—BREAK

10:30am–11:30am

Growing Your Prospect Database

*Online Marketing is here to stay. Learn from Academy experts
on why you need a strong prospect database and how to build it.*

Speaker: Rita Chaires

Everyone In Main Room

11:30am–1:30pm—LUNCH BREAK

Financial Database

*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.*

1:30pm–3:00pm

Hiring and Retention

- Transferable experience, what skills do you really need?
- Things that get a job seekers attention
- When to bring in help?

Speaker: Ron McNutt, *Senior Partner, RMI Executive Search*

1:30pm–3:00pm

**Hands-On Implementation of Growing Your Prospect
Database**

*Implement the strategies presented in the morning's Main
Room Session. Bring your laptop and login information for
your email marketing account. You will be able to leave this
session ready to market!*

Speaker: Rita Chaires and Team

3:00pm–3:30pm—BREAK

3:30pm–5:00pm

Success Stories and Lessons Learned

*Hear from a panel of Academy Members as they share their successes and lessons learned since the Fall Summit.
This session is always a favorite for owners and their teams, don't miss the opportunity to hear
what is working in your fellow Member's communities.*

Facilitator: Robert Armstrong, *Alicia Durante and Member Panel*

5:15pm—Social Event

Austin City Tour and BBQ Dinner

*Join your Academy friends on an adventure touring the sights and sounds of Austin and the city's main attractions.
We'll end the night with a Texas BBQ full of delicious local food.*

Ticket Price: \$155 per person, non-refundable

Saturday, May 14

EDUCATION TRACK (CLE ELIGIBLE)

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6:50am–7:50am—Document Language Committee Breakfast

MAIN SESSIONS

8:00am–9:45am

Freedom Accelerator: Creating Freedom in Your Life and Business

Speakers: Robert Armstrong and Sanford M. Fisch

BREAKOUT SESSIONS

8:00am–9:45am

Excel Basics for CounselPro™8 Users

This introductory, hands-on Excel session, is designed for novice Excel users to give you the fundamentals needed to work with the data you can export from CounselPro™8. You'll learn how to enter data into spreadsheets, perform simple calculations, copy and move data, and work with multiple worksheets within a single workbook. Bring a laptop with Excel installed to participate!

Speaker: Taylor Jones

9:45am–10:15am—BREAK

10:15am–11:45am

Trending Tax Strategies (CLE Eligible Session)

This session will cover tax and estate planning techniques that have attracted considerable attention and discussion recently including long-term GRATs, SLATs, using CRTs for retirement plans, using Trusts for vacation homes and Charitable Lead Trusts

Speaker: Sam Donaldson, Professor, Georgia State University College of Law

10:15am–11:45am

Excel-erating Your CounselPro™8 Reporting

This session is designed for intermediate Excel users that have a good understanding of Excel and would like to learn more advanced features that will improve your ability to review and analyze information you can export out of CounselPro™8. You will learn how to use functions to combine and split text, use conditional formatting, perform calculations across worksheets, use formulas, and more. This is a hands-on session, so you'll need to bring a laptop with Excel installed to participate.

Speaker: Randy Murray

11:45am–1:30pm—LUNCH BREAK

DocuBank New Member Lunch | Board of Governors Lunch

1:30pm–2:45pm

Fundamentals of Medicaid (CLE Eligible Session)

Speakers: Steve Hartnett and Tereina Stidd

1:30pm–2:45pm

Importing Data to CounselPro™8

During this session you will learn how to:

- Import data from external sources into CounselPro™8
- Add multiple contacts
- Update contact notes, relationships, and other information
- Assign multiple contact records to a workshop and seminar matter

This is a hands-on session where you'll be using your CounselPro™8 site, which means you'll need to bring a laptop with WIFI capability, and know your Actionstep login information. If you are not on CounselPro™8, you'll still be able to watch, but not participate.

Speakers: Randy Murray and Taylor Jones

2:45pm–3:00pm—BREAK

Saturday, May 14

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MAIN SESSIONS

3:00pm–5:00pm

Federal Tax Update (CLE Eligible Session)

Developments in federal income, estate, and gift taxes from the past 12 months. Lots to talk about even if “tax reform” doesn’t happen!

Speaker: Sam Donaldson, Professor, Georgia State University College of Law

BREAKOUT SESSIONS

3:00pm–4:15pm

Ready, Set, Print: The Marketing Coordinator’s Role in an Academy Co-Authored Book Project

Learn from Academy Book experts the tips and tricks to successfully proof and print your book in record time. Hear how Member panelists are using their Academy Co-Authored Books.

Speaker: Chloe Slovinsky and Academy Panel

4:15pm–5:00pm

Point Peeps Sneak Peek

Hear from the Point Peeps on their favorite aspects of the Point Peep Program and the ideas they’ve embraced from one another.

Facilitators: Practice Building Coaches

5:00pm–5:30pm—BREAK

5:30pm–6:30pm

Owner’s Only Roundtable Discussion: Employee Compensation and Benefits

Speakers: Member Panel

Sunday, May 15

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MAIN SESSIONS

8:00am–10:00am

Frequently Asked (Education) Questions! (CLE Eligible Session)

Our Education Team will cover the FAQs you need to know!

Speakers: Steve Hartnett and Tereina Stidd

BREAKOUT SESSIONS

Office Hours

Schedule one on one time with your Practice Building Coach or Online Marketing Coach on any areas of your practice needing extra attention. You pick time and topic, and discuss. Bring any relevant team members with you and get to work!

Speaker: OMG and Member Services Teams

10:00am–10:15am—BREAK

10:15am–Noon

Advanced Planning Overview (CLE Eligible Session)

Learn how one strategy could be better than the other depending upon the circumstances

Speakers: Steve Hartnett and Tereina Stidd

Office Hours

Speaker: OMG and Member Services Teams

END OF 2022 SPRING SUMMIT