AGENDA 2022 FALL SUMMIT

Refresh and Reset: Academy Systems and Workflows

Welcome to Coronado, CA

Thursday, November 3

EDUCATION TRACK (CLE ELIGIBLE)	PRACTICE MANAGEMENT AND MARKETING TRACK	TECHNOLOGY TRACK

9:00am–11:00am

Matson Money Advisor Meeting

Participating Matson attorneys are welcome!
Staff and non-participating attorneys' registrations will be approved prior to the Summit.

Speaker: TBD, Matson Money

10:30am–12:00pm

Pre-Summit Meet and Greet

Our VIP Guests and Newest Members get an opportunity to connect with Academy Members and their teams prior to the Summit. This session is included for VIP Guests and Members who have joined since the 2022 Spring Summit. Members interested in joining, please reach out to your PBC.

FALL SUMMIT 2022—MAIN SESSIONS

First Seat Free, Additional Seats $545 per person
Late Registration/Cancellation Fee: $225 per seat after registration closes, $375 cancellation fee week of October 31

1:00pm–2:15pm

Welcome and Opening Ceremony

Join Academy founders Robert Armstrong and Sanford M. Fisch as we kick-off the Fall 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 2023 and beyond.

Speakers: Robert Armstrong and Sanford M. Fisch

3:00pm–3:30pm—BREAK

3:30pm–5:00pm

Keynote Session: TBD

Keynote Speaker: TBD

6:30pm–9:00pm Cocktail Party and Dinner
Sponsored by Matson Money

Friday, November 4

EDUCATION TRACK (CLE ELIGIBLE)	PRACTICE MANAGEMENT AND MARKETING TRACK	TECHNOLOGY TRACK

MAIN SESSIONS CORONADO BALLROOM	BREAKOUT SESSIONS TIDELANDS BALLROOM

6:30am–7:45am—POINT PEEPS BREAKFAST
Invitation only

8:00am–10:00am

Practical Ethics for the Estate Planning Attorney
(CLE Eligible Session—120 minutes)
This session examines ethical quandaries and pitfalls to avoid in your practice.
Guest Speaker: Carole Buckner

8:00am–10:00am

Marketing Roundtable

Facilitator: Practice Building Coaches

10:00am–10:30am—BREAK

10:30am–11:30am

Matson Money Session

Speaker: Matson Money

ALL ATTENDEES IN MAIN ROOM

11:30am–1:30pm—LUNCH BREAK
Niche Lunch: Working with Family and Close Friends
Register in advance for this working lunch session where we examine strategies and tips for the unique dynamic of working with family and close friends.

1:30pm–3:00pm

Understanding and Leveraging New Technology
Learn more about recent Academy updates, including:
- New Members-Only website, Message Boards, Member Listing, and CLE Tracking
- Future enhancements in Actionstep
- Trends with Practice Management software

Speakers: Rita Chaires and Cody Bender, *Product Lead at Actionstep*

ALL ATTENDEES IN MAIN ROOM

3:00pm–3:30pm—BREAK

3:30pm–5:00pm

Success Stories and Lessons Learned

Facilitator: Robert Armstrong, Alicia Durante, and Member Panel

5:30pm–8:30pm—Social Event
Hotel Del Coronado Ghost Tour followed by Dinner at Miguel's Cocina
Transportation included
Ticket Price: $130 per person

Saturday, November 5

EDUCATION TRACK (CLE ELIGIBLE) | PRACTICE MANAGEMENT AND MARKETING TRACK | TECHNOLOGY TRACK

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

MAIN SESSIONS
CORONADO BALLROOM

8:00am–9:45am

Demystifying Medicaid and Medicaid Compliant Annuities

(CLE Eligible Session—105 minutes)

This session will examine Medicaid, and some tips and traps in Medicaid practice.

Speakers: Dale Krause, *Krause Financial Services*

BREAKOUT SESSIONS
TIDELANDS BALLROOM

8:00am–9:45am

Diagnosing Your Workflow Workshop—Part 1

Does your firm follow the Academy's new-client workflow's best practices? What opportunities are you missing? How can you streamline your processes? Attend this hands-on, interactive two-part Workshop to identify what you can be doing better and faster.

In Part 1 of the Workshop we will:

- Utilize the Academy's law firm audit to determine which best practices you are or are not following
- Review the current recommended workflow process

Speakers: Practice Building Coaches

9:45am–10:15am—BREAK

MAIN SESSIONS

10:15am–Noon

The MAIN SECRET to Successful Consultations

Attend this session to find out how to instantly improve your contributions to clients and your bottom line.

Bonus: *What is the best question to begin the Pain Gain Funnel?*

Speaker: Sanford M. Fisch

BREAKOUT SESSIONS

10:15am–Noon

Streamlining Your Asset Entry in CounselPro™8

Are you still collecting your client-asset information the old-school way? If you're ready to modernize your collection process and expedite the entry of asset information into the system, there's good news. We've created a better way!

Join this session to learn about the new, secure Online Asset Form that will help you streamline the collection and entry of your clients' asset information. Save time and increase accuracy!

Speakers: Randy Murray and Taylor Jones

Noon–1:30pm—LUNCH BREAK

DocuBank New Member Lunch | Board of Governors Lunch

MAIN SESSIONS

1:30pm–3:00pm

International Estate Planning Issues: Planning for Clients, Beneficiaries, and Assets Beyond Your Backyard

(CLE Eligible Session—90 minutes)

This session will examine various issues that arise when clients, their assets, or their beneficiaries are from a different country or in a different country.

Speaker: Steve Hartnett

BREAKOUT SESSIONS

1:30pm–3:00pm

Diagnosing Your Workflow Workshop—Part 2

In Part 2 of the Workshop we'll continue to explore:

- How to identify Systems issues and bottlenecks
- Tips and tricks to improve your workflow, and maximize your firm's efficiency and quality

Speakers: Practice Building Coaches

3:00pm–3:30pm—BREAK

Saturday, November 5

EDUCATION TRACK (CLE ELIGIBLE) | PRACTICE MANAGEMENT AND MARKETING TRACK | TECHNOLOGY TRACK

MAIN SESSIONS
CORONADO BALLROOM

3:30pm–5:00pm

Social Media Advertising 101:
Getting the Most Out of Your Ad Campaigns

Advertising on social media can be an easy, effective way to target brand new prospects and returning ones. Learn how to use various types of social media ads, including Facebook, Instagram, YouTube, and Google Local Service ads, to achieve real results while maximizing your marketing dollars:

- Targeting the right audience
- Setting the right budget
- Designing ads that capture attention
- Using the right metrics to measure the effectiveness of your campaigns

Speakers: Rita Chaires and OMG Team

BREAKOUT SESSIONS
TIDELANDS BALLROOM

3:30pm–5:00pm

Time-Saving Features of CounselPro™8

Are you making CounselPro™8 work for you or are you just working in CounselPro™8?

CounselPro™8 has come a long way since it was rolled out and there are a lot of time-saving features you may have missed.

During this session you'll learn about various time-saving features and how to use them.

This is a must attend session for those who want to take full advantage of all the features of CounselPro™8.

Speakers: Randy Murray and Taylor Jones

5:00pm–5:30pm—BREAK

5:30pm–6:30pm

Owners-Only Roundtable Discussion: TBD

Speakers: Member Panel

Sunday, November 6

EDUCATION TRACK (CLE ELIGIBLE) | PRACTICE MANAGEMENT AND MARKETING TRACK | TECHNOLOGY TRACK

MAIN SESSIONS
CORONADO BALLROOM

8:00am–10:00am

Foundations of Trust Administration

(CLE Eligible Session—120 minutes)

This presentation will explore the fundamentals of Trust Administration, including the roles and responsibilities of the trustee in Trust Administration.
It will also examine the rights of beneficiaries.

Speakers: Tereina Stidd

BREAKOUT SESSIONS
TIDELANDS BALLROOM

8:00am–10:00am

Hands-On: The Mechanics of Creating Facebook and Google Ad Campaigns

During this hands-on training session, we'll walk through the mechanics of setting up Facebook, Instagram, and Google Local Service ads. Bring your laptop, along with your social media logins, and get expert guidance every step of the way as you select campaign objectives, source images, write copy, and build out actual campaigns that you can use over and over again.

Speaker: Rita Chaires and OMG Team

10:00am–10:15am—BREAK

10:15am–Noon

IRAs and Retirement Plans: What You Need to Know

(CLE Eligible Session—105 minutes)

This CE program is designed to enable Members to educate centers-of-influence on planning for IRAs and retirement plans after the passage of the SECURE Act and its regulations. This session is designed for developing relationships with centers-of-influence, bring in new clients, and help existing ones.

Speakers: Steve Hartnett

10:15am–Noon

Office Hours

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

Speaker: OMG and Member Services Teams

END OF 2022 FALL SUMMIT

Sunday, November 6

CORE II OPTIONAL TRAINING ON ILITS AND CRTS (WITH OTHER SELECT TOPICS)

$495 PER PERSON—LATE REGISTRATION/CANCELLATION FEE: $225 PER SEAT AFTER REGISTRATION CLOSES,
$375 CANCELLATION FEE WEEK OF OCTOBER 31
TIDELANDS BALLROOM

2:00pm–3:15pm

Irrevocable Life Insurance Trusts

(CLE Eligible Session)

Learn how ILITs can be important. Discover the mistakes you may be making and how to correct them.

Speakers: Steve Hartnett and Tereina Stidd

3:15pm–3:30pm—BREAK

3:30pm–5:00pm

Irrevocable Life Insurance Trusts—*Continued*

(CLE Eligible Session)

Learn the intricacies of the use of ILITs, including the Transfer for Value Rule. Overview of the ILIT CIF.

Speakers: Steve Hartnett and Tereina Stidd

Monday, November 7

CORE II OPTIONAL TRAINING ON ILITS AND CRTS (WITH OTHER SELECT TOPICS)

$495 PER PERSON—LATE REGISTRATION/CANCELLATION FEE: $225 PER SEAT AFTER REGISTRATION CLOSES,
$375 CANCELLATION FEE WEEK OF OCTOBER 31
TIDELANDS BALLROOM

8:00am–9:30am

Charitable Remainder Trusts

(CLE Eligible Session)

Learn how a CRT can save on income taxes while creating an income stream for the client.
Learn the various types of CRTs and learn when each is appropriate.

Speakers: Steve Hartnett and Tereina Stidd

9:30am–10:00am—BREAK

10:00am–Noon

Charitable Remainder Trusts—*Continued*, Plus Other Select Topics

(CLE Eligible Session)

Learn common CRT mistakes and how to avoid them. Overview of the CRT CIF.
Select Income Taxation Issues, including an overview of Income Taxation of Trusts and Estates.

Speakers: Steve Hartnett and Tereina Stidd

END OF 2022 FALL SUMMIT OPTIONAL TRAINING