

AGENDA

2023 FALL SUMMIT

Welcome to San Diego, CA

Wednesday, October 4

OPTIONAL TRAINING: CONSULTATION MASTERY

\$1,025 per seat*

8:00am–4:00pm

2023 Personal Consultation Training with GuruGanesha Khalsa

Considered by many to be the most sought after sales trainer in the high tech/software industry, GuruGanesha Khalsa, affectionately known as 'Ganesh,' blends savvy New York street smarts, Eastern metaphysical insight, and mastery of the Conscious Selling System® in an electrifying training style. His unique brand of "Sales Edutainment" is generously spiced with humorous stories garnered during a colorful career in sales management and sales training.

Speaker: GuruGanesha Khalsa

**Look for your \$100 gift card from the Academy in the mail (one per firm)*

Thursday, October 5

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

9:00am–11:00am

Pre-Summit Coffee Meet-Up

Calling all Summit goers! You don't have to wait until the cocktail party to kick-off your networking. Join us before the Summit to connect with your fellow Academy Members over muffins and coffee. All Summit attendees are welcome!

Speaker: TBD

9:00am–11:00am

Advisor Meeting TBD

More details to come!

FALL SUMMIT 2023—MAIN SESSIONS

First Seat Free, Additional Seats \$645 per person
Late Registration/Cancellation Fee: \$275 per seat after September 11
\$645 cancellation fee week of October 2 (full seat price)

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 30 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

Thursday, October 5

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

3:00pm–3:30pm—BREAK

3:30pm–5:00pm

Keynote Session: Wholistic Planning for Life, Health & Wealth with Integrity

Speaker: Bryan Adams, Co-Founder and CEO at Integrity Marketing Group LLC

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

Join us as we celebrate 30 years of the Academy at our Fall Summit. No need for gowns and tuxedos this time. We'll be outside enjoying the beautiful San Diego fall weather. Dressy Casual attire for this evening event is requested.

Friday, October 6

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

MAIN SESSIONS

BREAKOUT SESSIONS

6:30am–7:45am—POINT PEEPS BREAKFAST

Invitation only Ask your PBC if you are interested in attending

8:00am–10:00am

Avoiding Ethical Traps, Tricks, and Trip Ups in Estate Planning (CLE Eligible Session 120 minutes)

Ethical issues can arise when you least expect them. This is one area you don't want to be in the limelight. In this session, you'll hear ethical issues:

- That arose from family members and friends attempting to interfere in an estate plan
- In handling clients with questionable cognitive skills
- With new significant others and marriages
- In how continuing obligations to a past client can result in future ethical violations

We'll also share best practices for spotting and handling ethical traps, tricks, and missteps, that face your practice every day.

Speakers: Stewart Albertson and Keith Davidson, Albertson & Davidson LLP

8:00am–10:00am

Marketing Roundtable

Get ready to ignite your marketing prowess at the highly anticipated "Marketing Roundtable" session! At this beloved staple of the Academy Summits, you'll tap into the collective genius of your fellow marketers. Don't forget to bring your favorite marketing pieces to display at our Show and Tell Table.

Facilitator: Practice Building Coaches

10:00am–10:30am—BREAK

10:30am–Noon

Insurance Audits: Why They Help Your Clients and Your Practice?

Hear from Robert and Sandy on the importance of conducting insurance audits and the value they bring to your clients. Guest Speaker Tim Ash will walk through case studies as well.

Speakers: Robert Armstrong, Sanford M. Fisch, and Tim Ash

10:30am–Noon

Marketing Certification Program Redux

Earn some Academy marketing street cred as we breathe new life into our Marketing Certification Program! You'll learn what will be included in the updated program, why you should participate, and will get to check off the first box of your certification journey.

Facilitator: Practice Building Coaches

Friday, October 6

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

Noon–2:00pm—LUNCH BREAK

Niche Lunch: Taking Care of You: Tips and Tricks for Mindfulness and Self-Care

Discover the key to thriving in the workplace with the “Self-Care and Wellness” session. Uncover effective strategies for nurturing mental and physical health, recognizing stress, and building resilience in a supportive work environment. Elevate productivity and job satisfaction through actionable self-care practices and a harmonious work-life balance.

Cost: \$75 per person

Facilitators: Alicia Durante, Carrie Smith, and Bri Nordstrom

2:00pm–3:45pm

Trust Administration Unleashed: Academy’s New Trust Administration Module and CounselPro™8 Workflow

(CLE Eligible Session 105 minutes)

THIS SESSION IS INTENDED FOR ATTORNEYS AND PARALEGALS

The highly anticipated Trust Administration Module is ready for use in your law firm! Hear from Tereina Stidd on the updates made to the TA Module. Randy Murray will then walk you through how the TA workflow is used in Actionstep!

Speaker: Tereina Stidd and Randy Murray

2:00pm–3:45pm

Planting the Marketing Seeds for Trust Administration Success (Part 1)

THIS SESSION IS INTENDED FOR MARKETING COORDINATORS

Healthy trust administration revenue and business don’t happen by accident. Learn how to cultivate Trust Administration business through each of your marketing channels.

Speaker: Rita Chaires and Practice Building Coaches

3:45pm–4:00pm—BREAK

4:00pm–5:00pm

Human Resources: Why It’s Imperative You Have an Employee Handbook

Learn why you need a handbook if you have one or 101 employees. In this session, we’ll cover what needs to be in it and why, how often to review the content and how it ties back to staff reviews.

Speaker: Jill Hutchinson and Ania Behm

4:00pm–5:00pm

Funding in CounselPro™8

Go through the client journey of funding in CounselPro™8. Our Tech Support team will walk you through the workflow, show you how to run reports, and be a source of knowledge for your clients.

Speakers: Randy Murray, Taylor Jones, Randy Harwick, and Donna Hooper

5:30pm–8:30pm—Social Event

Pelly’s Mini Golf Adventure

Join your fellow Academy Members as San Diego’s newest mini golf location. Enjoy this interactive evening where you’ll be able to show off your putt-putt skills. A Mexican food buffet and one drink ticket are included as well as transportation.

Cost: \$90 per person

Saturday, October 7

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

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

8:00am–9:30am

Success Stories and Lessons Learned

Hear from a panel of Academy Members as they share their successes and lessons learned since the Spring 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.

Facilitators: Robert Armstrong, Alicia Durante, and Member Panel

9:30am–10:00am—BREAK

10:00am–11:30am

Unlocking Your Business Potential: Embracing the Entrepreneurial Operating System (EOS)

FOR LAW FIRMS WHO HAVE NOT IMPLEMENTED EOS

What the heck is EOS? Learn about the Entrepreneurial Operating System and how it can change the way your law firm operates. With EOS, chaos and confusion make way for efficiency and effectiveness. Bid farewell to silos and welcome a culture of communication, where everyone is on the same page, driving your firm forward as a cohesive force.

Speaker: TBD, EOS Implementer

10:00am–11:30am

Fine Tuning EOS in Your Law Firm

FOR LAW FIRMS WHO ARE CURRENTLY USING EOS

If you're currently using EOS in your law firm, you need to be in this session. Hear from Academy firms on pitfalls to avoid, scorecard metrics to track, the process of setting rocks, and much more.

Speakers: Erin Mathew and Alicia Durante

11:30am–1:30pm—LUNCH BREAK

DocuBank New Member Lunch | Board of Governors Lunch

1:30pm–3:30pm

Pooled Special Needs Trusts

(CLE Eligible Session 90 minutes)

- What is a PSNT?
- How to incorporate PSNTs into Estate Plans
- How to incorporate ABLE Act Accounts into estate plans

Speakers: Rachel Baer, CCT

1:30pm–3:30pm

Planting the Marketing Seeds for Trust Administration Success (Part 2)

THIS SESSION IS INTENDED FOR MARKETING COORDINATORS

So you planted the seeds, now what? This tactical session will focus on key steps you can take to implement marketing opportunities for Trust Administration.

Speaker: Practice Building Coaches

3:30pm–3:45pm—BREAK

3:45pm–5:00pm

How AI Can Help You Win at Online Marketing

Unlock the future of online marketing in this groundbreaking session. Join us as we delve into the limitless possibilities and game-changing strategies that emerge when artificial intelligence meets the digital marketing realm. Discover how AI can revolutionize your marketing efforts, from dynamic content creation to automated campaign optimization. Don't miss this transformative session that will empower you to unleash the true potential of AI and supercharge your online marketing success.

Speakers: Rita Chaires

ALL IN MAIN ROOM

Saturday, October 7

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

5:30pm–6:30pm—SATURDAY NIGHT ROUNDTABLE

Trust Administration

Hear from fellow Academy Members on how Trust Administration works in their law firm. From setting client expectations, pricing, handling consultations to the work involved 1st death & 2nd death.

Sunday, October 8

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

8:00am–10:00am

Deeper Dive into Taxation of Trust

(CLE Eligible Session 120 minutes)

Get ready to dig into the highly complex tax concepts from estate tax, income tax, gift tax, and GST tax.

Speakers: Tereina Stidd and Steve Hartnett

8:00am–10:00am

Pay-Per-Click:

Attract More Clients and Grow Your Business

Supercharge your client attraction and business growth with Pay-Per-Click for your law firm! In this power-packed session, discover the incredible potential of PPC advertising to reach your target audience and drive traffic to your website. Gain expert insights on selecting keywords, crafting compelling ad copy, and avoiding common PPC pitfalls. With our comprehensive guidance, you'll leave equipped to create and manage highly successful PPC. Don't miss this opportunity to master the art of PPC and unlock unparalleled growth opportunities for your firm!

Speakers: Rita Chaires and Rochell Javier, OMG Team

10:00am–10:15am—BREAK

10:15am–Noon

Advanced Issues in Trust Administration

(CLE Eligible Session 105 minutes)

This session will give you the real-life examples of some of the most complex problems that arise in Trust Administration. We'll run through scenarios and the best way to handle them. If you've asked yourself any of the questions below, you won't want to miss this session.

- What happens if the trustee never funded the trust?
- What happens if you have hard to value assets?
- What happens if the beneficiaries don't agree with things?

Speaker: Tereina Stidd

10:15am–Noon

Office Hours

Book a one-on-one appointment with your Practice Building Coach, OMG Coach, CounselPro Team, etc. Calendly links will be sent out after registration closes.

END OF 2023 FALL SUMMIT MAIN SESSIONS