

2010 Spring Summit - Boston, MA

Topic Legend:

- › **PM** - Practice Management
- › **ED** - Education
- › **M** - Marketing

Thursday, April 29th, 2010 - 1st Global Sessions

8:00 am - 9:15 am	Success Stories Speaker: <i>Al Prentice</i>
9:15 am - 9:30 am	BREAK
9:30 am - Noon	Building a World Class Wealth Care Business - <i>This session is open to all Academy members</i> Speakers: <i>Tom Gau and Ken Unger</i>

Thursday, April 29th, 2010 - Main Sessions

1:00 pm - 2:00 pm	Welcome and Introductions Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>
2:00 pm - 3:15 pm	State of the Academy Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>
3:15 pm - 3:30 pm	BREAK
3:30 pm - 5:30 pm	Keynote Topic: Competitive Advantage: Is Yours a Hit or a Myth? Keynote Speaker: <i>Jaynie Smith, Smart Advantage, Inc.</i>
6:30 pm - 9:00 pm	Buffet Dinner and Cocktail Party Sponsored by: <i>Legacy Safeguard</i>

Friday, April 30th, 2010 - Main/Breakout Sessions

	Main Sessions	Breakout Sessions
8:00 am - 9:30 am	<p>PM Topic: Update on eLawyering, plus Online Marketing Domination</p> <p>Speakers: <i>Robert Armstrong and Sanford M. Fisch</i></p>	<p>CounselPro™ 6.0 - Database Bringing DAP and CounselPro™ Users Up To Speed</p> <ul style="list-style-type: none"> › What's new on the marketing side › New features that differ from CATs <p>Speakers: <i>Technical Support Team</i></p>
9:30 am - 9:45 am	BREAK	
9:45 am - Noon	<p>ED Topic: Continuing Education Course for Family Law Attorneys - Death and Divorce</p> <p>Speakers: <i>Dennis Sandoval and Steve Hartnett</i></p>	<p>CounselPro™ 6.0 - Database Bringing DAP and CounselPro™ Users Up To Speed Cont'd</p>
Noon - 2:00 pm	<p>LUNCH BREAK Financial Database Open to Participating Members Only</p>	
2:00 pm - 3:00 pm	<p>PM/M Topic: Insurance Options and Funeral Trust Update</p> <p>Speakers: <i>Sanford M. Fisch and Bryan Adams, Premier Planning</i></p>	<p>1:30 pm - 2:45 pm CounselPro™ 6.0 - Database New ToDos, My ToDos and Historical Data Feature that Replaces Activities</p> <ul style="list-style-type: none"> › How it works and where your old activities went › How to find the archived information › My ToDos › New "Communicate" feature to use with Outlook and email others about Tasks they need to complete › Assigning Tasks to other staff members › Creating new ToDos and clearing old tasks completed to Historical Data <p>Speakers: <i>Technical Support Team</i></p>
3:00 pm - 3:30 pm	BREAK	
3:30 pm - 5:00 pm	<p>M Topic: Success Stories</p> <p>Facilitator: <i>Robert Armstrong</i></p>	<p>3:00 pm - 5:00 pm CounselPro™ 6.0 - Database Introducing New Wizard Features</p> <p>This new feature automates some of the daily processes, including:</p> <ul style="list-style-type: none"> › Seminar Reservations › Seminar Results › Initial Consultation Results/Client Retention › Document Production Status <p>Speakers: <i>Technical Support Team</i></p>
TBD	<p>Social Event: All Aboard - Boston by Land and by Sea! Ticket Price: \$100 per person</p>	

	Main Sessions	Breakout Sessions
6:45 am - 8:00 am	EDUCATION ADVISORY BOARD BREAKFAST	
8:00 am - 8:30 am	<p>PM Topic: CounselPro™ Overview</p> <p>Speakers: <i>Robert Armstrong and Sanford M. Fisch</i></p>	<p>CounselPro™ 6.0 - Documents Document Creation Overhaul</p> <ul style="list-style-type: none"> › What's new › How it works › Creating various estate plans and changing them easily to another type of plan <p>Speakers: <i>Technical Support Team</i></p>
8:30 am - 9:45 am	<p>ED Topic: Income Only Trusts for Middle Class Asset Protection (Medicaid and VA Planning)</p> <p>Speaker: <i>Dennis Sandoval</i></p>	
9:45 am - 10:00 am	BREAK	
10:00 am - 11:15 am	<p>PM Topic: Annual Wealth Care Maintenance Program Update</p> <p>Speakers: <i>Robert Armstrong, Sanford M. Fisch and Member Panel</i></p>	<p>CounselPro™ 6.0 - Documents Document Creation Overhaul Cont'd</p> <p>Speakers: <i>Technical Support Team</i></p>
11:15 am - Noon	<p>M/ED Topic: Pet Niche Update and Documents</p> <p>Speaker: <i>Robert Armstrong and Sanford M. Fisch</i></p>	
Noon - 2:00 pm	LUNCH BREAK Board of Governors Board Meeting Docubank New Member Lunch	
2:00 pm - 4:00 pm	<p>ED Topic: An Afternoon with Natalie Choate</p> <ul style="list-style-type: none"> › Death and Taxes: The Inherited Retirement Plan (1 Hour) › Understanding the Minimum Distribution Rules (1 Hour) <p>Speaker: <i>Natalie Choate</i></p>	<p>1:30 pm - 2:45 pm</p> <p>CounselPro™ 6.0 - Documents Amendment Module</p> <ul style="list-style-type: none"> › New Feature! › How it works <p>Speakers: <i>Technical Support Team</i></p>
4:00 pm - 4:15 pm	BREAK	
4:15 pm - 5:15 pm	<p>ED Topic: An Afternoon with Natalie Choate</p> <ul style="list-style-type: none"> › 194 Best and Worst Planning Ideas for Your Clients Retirement Benefits <p>Speaker: <i>Natalie Choate</i></p>	<p>3:00 pm - 5:00 pm</p> <p>CounselPro™ 6.0 - Documents Using the New Time Management Features</p> <ul style="list-style-type: none"> › The copy features › New infrastructure of document creation to change an existing plan › Assemble all documents at one time › Where the new files have been placed in your system › How to find the CIFs › How the new CPManual works › What you need to know about scheduling installation of 6.0 <p>Speakers: <i>Technical Support Team</i></p>

5:15 pm - 5:30 pm	BREAK
5:30 pm - 6:30 pm	ROUNDTABLE DISCUSSION FOR MEMBERS ONLY Topic: TBD
7:00 pm	PEAK PERFORMER DINNER FOR APPLICANTS AND PARTICIPANTS

Sunday, May 2nd, 2010 - Main Session

8:00 am - 10:00 am	ED Topic: CounselPro™ 6.0 Client Intake Form Review <ul style="list-style-type: none"> › Married Joint Revocable Living Trust Speaker: Dennis Sandoval
10:00 am - 10:15 am	BREAK
10:15 am - Noon	ED Topic: Roth IRAs for Everyone: Conversions in 2010 and Beyond Speaker: Steve Hartnett
END OF 2009 SPRING SUMMIT	