

AGENDA 2019 Fall Summit

EDUCATION TRACK
(CLE ELIGIBLE)

PRACTICE MANAGEMENT
AND MARKETING TRACK

TECHNOLOGY TRACK

Wednesday, October 16

8:00am–9:00am—BOOT CAMP BREAKFAST

9:00am–6:00pm

BOOT CAMP TO SUCCESS

Creating a Purpose and Profit-Driven Practice
with Academy Co-Founders Robert Armstrong and Sanford M. Fisch
\$395 per seat— For VIP Guests AND all Members and team members needing a refresher
on the 11 Essential Systems of the Academy

- 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

***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 | VIP Guests please email information@aeapa.com

Thursday, October 17

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

8:00am–9:00am—BOOT CAMP AND MATSON MONEY BREAKFAST

9:00am–11:30am

BOOT CAMP TO SUCCESS

Creating Your Roadmap for Success— Hands-On Marketing Plan Creation

- Identify **Revenue Goals**
- Identify **Possible Marketing and Promotional Activities**
- Calendar **Revenue Generating and Networking Activities**

Speakers: Jennifer Price, *Chief Operating Officer*

Alicia Durante, *Director of Member Services*

Rita Chaires, *Director of Web and Online Services*

Steve Hartnett, *Director of Education*

Randy Murray, *Senior Technical Solutions,
Training, and Product Manager*

9:00am–11:30am

MATSON MONEY ADVISORS MEETING

Speaker: Mark Matson and Alex Ash

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

FALL SUMMIT 2019—MAIN SESSIONS

First Seat Free, Additional Seats \$495 Per Person
Session Walk-Ins: Law Firms Will Be Charged \$125 Per Person, Per Session
\$90 per binder | \$35 per USB | Downloads Free

1:00pm–2:30pm

Welcome and Opening Ceremony

Speakers: Robert Armstrong and Sanford M. Fisch

2:30pm–3:15pm

Founders Message

Speakers: Robert Armstrong and Sanford M. Fisch

3:15pm–3:30pm—BREAK

3:30pm–5:00pm

Keynote Speech

Keynote Speaker: Steve Fisher, *The All-Time Winningest Coach of San Diego State University*

6:30pm–9:00pm **COCKTAIL PARTY AND DINNER**

Sponsored by: Matson Money



Friday, October 18

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

6:30am–7:45am—POINT PEEPS BREAKFAST

MAIN SESSIONS

8:00am–10:00am

Document Fraud in Elder Abuse and Probate Cases

Speaker: Mike Wakshull, MS, CQE, CISA, PMP, Q9 Consulting, Inc.

BREAKOUT SESSIONS

8:00am–10:00am

Marketing Roundtable

Speakers: Member Services

10:00am–10:15am—BREAK

10:15am–Noon

Special Hands-On Workshop: Your True Purpose for Money

All staff and spouses are highly encouraged to attend

Speaker: Mark Matson, *Matson Money*

No Breakout Session

Noon–2:00pm—LUNCH BREAK

NICHE LUNCH: ON THE GOLDEN PATH

Are you on the golden path? If you're a firm owner and are already on the road to retirement or are planning to retire in the next 10 years, this lunch is for you. Enjoy the opportunity to brainstorm with your peers in consideration of what you need to plan for, or begin preparing, as you establish your succession plan.

Cost: \$56.57 per person

2:00pm–3:15pm

TBA

Speaker: TBA

2:00pm–3:15pm

Planning and Promoting a Successful Seminar

This session will focus on the planning work that sets up your seminars for success. Everything from venue selection and pre-event checklists, to properly setting up seminar webpages and email campaigns in Mail Chimp.

Speakers: Erin Mathew and Rita Chaires

3:15pm–3:30pm—BREAK

3:30pm–5:00pm

Success Stories and Lessons Learned

Facilitator: Robert Armstrong

No Breakout Session

5:30pm–9:15pm—SOCIAL EVENT: A NIGHT AT TAVERN + BOWL EAST VILLAGE

Enjoy a night filled with lots of delicious food, bowling and socializing with your Academy friends. Bowling shoes and rental included with the price. We'll bus everyone to downtown San Diego and back to Coronado Island at the end of the night.

Tickets: \$90 per person, non-refundable

Saturday, October 19

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6:50am–7:50am—DOCUMENT LANGUAGE COMMITTEE BREAKFAST

MAIN SESSIONS

8:00am–10:00am

Estate Planning Considerations in Divorce

Speaker: Dennis Sandoval

BREAKOUT SESSIONS

8:00am–10:00am

Online Marketing Group: Building a Successful Social Media Marketing Plan

- Discover where your ideal clients are
- Turning prospects into engaged superfans
- Creating content that engages prospects
- The future of social media networks

Speakers: Rita Chaires and Roberta Ferguson

10:00am–10:15am—BREAK

10:15am–Noon

A Respectful Workplace

- What a respectful workplace looks like
- Cultural differences
- Reporting responsibility
- Sample harassment policy
- Harassment EEOC's definition

Speakers: Emily Possidento and Tina Brown, *MCM CPA*

10:15am–Noon

Hooks, Lines, and Stinkers: Your Guide to Crafting Open-Worthy Email Subject Lines and Headlines

Speakers: Practice Building Coaches

Noon–2:00pm—LUNCH BREAK

**DocuBank New Member and VIP Guest Lunch | Board of Governors Lunch
Peak Performers Top 5 Benefits Luncheon**

2:00pm–3:30pm

Ethics: Issues of Attorney Client Privilege and Ethical Issues When Changing Fiduciaries

Speaker: Andrew Verriere, *Hartog, Baer & Hand APC*

2:00pm–3:30pm

Pre-Qualifying Clients for Client Review Meetings

Speakers: Practice Building Coaches

3:30pm–3:45pm—BREAK

3:45pm–5:00pm

Law Firms and the Day You Hope Will Never Come: Preparing for Disaster

Speaker: Kathryn Scourby, *CBCP KNS Consulting, LLC*

3:45pm–5:00pm

Funding Forum

This workflow-focused roundtable will feature experienced paralegals and Members, sharing their best practices on handling common funding situations.

Speakers: Paralegal and Member Panel with Practice Building Coaches and Randy Murray

5:00pm–5:30pm—BREAK

5:30pm–6:30pm

Owners-Only Roundtable Discussion: Structuring Incentive Packages

Speakers: Member Panel

Sunday, October 20

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MAIN SESSIONS

8:00am–10:00am

Trust Administration

Join Dennis for a review of Trust Administration from A to Z. Learn when you'd file an estate tax return, whether it's better to elect portability or fund the Family Trust, and how to maximize discounts and other post-mortem planning techniques. This presentation will include a comprehensive Trust Administration checklist.

Speaker: Dennis Sandoval

BREAKOUT SESSIONS

8:00am–10:00am

Hands-On CounselPro™ 8 Training: Special Features*

This training is for current CounselPro™ 8 users. You must be able to login to your CP8 site during the training.

- Billing and Invoicing
- Creating Asset Transfer Letters

Speaker: Randy Murray

*Please bring a laptop loaded with Microsoft Office and wi-fi capabilities. You must register in advance for Hands-On Trainings.

10:00am–10:15am—BREAK

10:15am–Noon

Quiz Show: Solutions to Common Estate Planning Questions

Speaker: Steve Hartnett

10:15am–Noon

Hands-On Training: Intermediate Excel*

- Perform text functions
- Conditional calculations
- Calculate data across worksheets
- PivotTables and PivotCharts

Speaker: Randy Murray

*Please bring a laptop loaded with Microsoft Office and wi-fi capabilities. You must register in advance for Hands-On Trainings.

END OF 2019 FALL SUMMIT

Sunday, October 20

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

CORE I OPTIONAL TRAINING

PRICE: \$495, FELLOWS SPECIAL RATE: \$396

MPS/MEDICAID OPTIONAL TRAINING

OPEN TO ALL FIRMS!

FREE FOR MPS PARTICIPANTS, NON-PARTICIPANTS \$195

2:00pm–6:00pm

Core I Training

Join Steve as he tackles the tax aspects of estate planning, including the Estate Tax, the Gift Tax, the GST Tax, and the relevant Income Tax provisions. This course will review the applicable Internal Revenue Code sections in the relevant areas.

- Learn why inclusion in the taxable estate is a critical issue, even if the client doesn't have a taxable estate
- Learn what's included in the taxable estate and why
- Learn when a gift is complete. Learn what a GST transfer is and why you might want to consider utilizing GST exemption even if the client will never have grandchildren
- Finally, learn why income tax planning is now central to estate planning

1:00pm–6:00pm

MPS/Medicaid

"Participant Refresher" Workshop

- MPS Website Walk Through: Discover What's Available at Your Fingertips
- Increase Your Revenue Using Nursing Home Marketing
- Understand the "Name on the Check Rule" When Medicaid Planning Involves IRAs
- Exclusive Analysis of the Industry Leading Personal Services Contract
- California Medicaid Software Demonstration, Including an In-Depth Review of the Funding Schedule
- Asset Protection Trusts for More than Long-Term-Care Planning: Using Trusts as Prenuptial Agreements to Protect Assets Upon Divorce
- The Anatomy of a \$23,000 Medicaid Plan: What Every Elder Lawyer Wants to Know

Speaker: Dave Zumpano, *Lawyers with Purpose*

Monday, October 21

CORE I OPTIONAL TRAINING

PRICE: \$495, FELLOWS SPECIAL RATE: \$396

8:00am–Noon

Core I Training *Cont.*

Speaker: Steve Hartnett