

# AGENDA 2021 Fall Summit

In Good Company: Connections for a Lifetime

THE US GRANT, a Luxury Collection Hotel, San Diego CA

Thursday, October 14

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

10:30am–12:30pm

**VIP Guest Meet and Greet**

*Invitation Only. Contact your PBC if you are interested in attending.*

*Crystal Ballroom*

## FALL SUMMIT 2021—MAIN SESSIONS

*First Seat Free, Additional Seats \$565 Per Person | Session Walk-Ins: Law Firms Will Be Charged \$125 Per Person, Per Session*

1:00pm–2:15pm

**Welcome and Opening Ceremony**

*Crystal Ballroom*

*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**

*This session is an Academy Favorite, Robert Armstrong and Sanford M. Fisch deliver their own keynote on a topic that will help propel your law firm forward.*

**Speakers:** Robert Armstrong and Sanford M. Fisch

3:00pm–3:30pm—BREAK

3:30pm–5:00pm

**Keynote Session from Robert Armstrong & Sanford M Fisch**

**Keynote Speakers:** Robert Armstrong & Sanford M Fisch

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

*Bivouac Ballroom and Foyer*

# Friday, October 15

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

**MAIN SESSIONS**  
PRESIDENTIAL BALLROOM

**BREAKOUT SESSIONS**

6:30am–7:45am

## Point Peeps Marketing Breakfast: Open to Everyone

*Marketing, Muffins, and a side of Peeps! Grab your breakfast and join us for an early morning shot of coffee and marketing shot to the arm to roundtable your most successful marketing activities in the last 6 months.*

8:00am–9:30am

### Nurturing relationships with Online Marketing:

- Email marketing
- Local SEO and community link building
- Online reviews
- Google My Business

**Speaker:** Gyi Tsakalakis, Attorney Sync, A Digital Marketing Agency

8:00am–9:30am

### CounselPro™ List Views

*During this session the CounselPro™ 8 Team will demonstrate how to use, modify, and create list view reports.*

- **Existing list views**—What list views are provided with CounselPro™ 8
- **Using a list view**—See how to sort, filter, and save filters
- **Modifying a list view**—How to add/remove fields on a list view
- **Creating a new list view**—Learn how to create contact, matter, and other list views
- **Advanced feature**—Setting how to export, print, and setup a heads-up rule

**Speaker:** Randy Murray

9:30am–10:00am—BREAK

10:00am–11:45am

TBD

**Speaker:** TBD

11:45am–1:30pm—LUNCH BREAK

## 11:45am–1:30pm—Niche Lunch for Solopreneurs in Palm Court

*Whether you're on the ground floor of building your firm or you've made it to the big leagues and have a team supporting you, we know being a solopreneur is a big deal that comes with a big pay-off when done well. Enjoy a lunch with like-minded solopreneurs (no partners to share in your love, pain, and risk) to share tips and tricks for making it all work.*

*Participation Fee: \$73 per person (includes lunch). Pre-registration required.*

1:30pm–3:00pm

### Estate Planning for the Personal Injury Client: Understanding Disability Benefits

*This session will cover the basics of public benefits, how using Special Needs Trusts (SNTs) for injured clients will preserve these benefits, as well as other reasons to use SNTs. It will also address how disbursements can be spent, Medicare Set-Aside concerns, how to weave structured settlements into the equation and pitfalls to avoid when public benefits are involved. Estate planning attorneys can assist an injured client in maintaining their public benefits while ensuring the longevity of their personal injury award.*

**Speaker:** Joanne Marcus, President and CEO, and Karen Dunivan Konvicka, Director of Client Services and General Counsel, Commonwealth Community Trust

1:30pm–3:00pm

### Handling Challenging Calls and Cancellations

*Capitalize on your marketing efforts by reducing cancellations with effective communication skills. In this hands-on session, participants will practice how to approach difficult calls and turn objections into opportunities.*

**Speakers:** Practice Building Coaches

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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 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.*

**Facilitator:** Robert Armstrong and Member Panel

5:00pm–6:30pm—BREAK

6:30pm—Social Event: Shout House!

**Laugh, Sing & Shout the night away at San Diego's BEST Live Music Venue**

*The dueling piano show consists of two piano players, performing at two face to face grand pianos. The performances are high energy, with audience participation, staff dancing on stage, comedy, and sing-along.*

*Ticket Price: \$99 per person, non-refundable*

# Saturday, October 16

EDUCATION TRACK (CLE ELIGIBLE)

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TECHNOLOGY TRACK

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

**MAIN SESSIONS**  
PRESIDENTIAL BALLROOM

**BREAKOUT SESSIONS**

9:45am–10:15am—BREAK

8:00am–9:45am

## Back to Basics

*Hear from Academy Co-Founder, Sanford M. Fisch, on a back to basics topic that firm owners need to focus on. Details to come.*

**Speaker:** Sanford M. Fisch

10:15am–Noon

## Best Practices in Hiring

- How to make your firm marketable in a tough job market
- Best practices on hiring ads—what to include and how to say it
- Where to find candidates
- Other tips/tricks for finding the right candidates

**Speakers:** Academy Practice Building Coaches with Emily Possidento, MCM HR Advisory Services

8:00am–9:45am

## Hands-On Implementation of Online Marketing

*Implement the strategies presented in Gyi Tsakalakis' session, Client Development Using Online Marketing. Bring a laptop so you can walk out of this session with your action items already checked-off your list before returning to the office.*

**Speaker:** Rita Chaires and Team

10:15am–Noon

## Managing Money in CounselPro8

*Join this CounselPro 8 session as we review topics regarding financial matters in Actionstep. During this hands-on session, Taylor Jones will cover topics such as Asset Funding, Billing, and the Portal. Bring your laptop/tablet and follow along as we learn a thing or two about CP8!*

**Speaker:** Taylor Jones

# Saturday, October 16

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Noon–1:45pm—LUNCH BREAK

*DocuBank New Member Lunch At Restaurant | Board of Governors Lunch in Senate Room*

## MAIN SESSIONS PRESIDENTIAL BALLROOM

1:45pm–2:45pm

### Technology Update

*Marketing and technology are both powerful tools that enable us to make and foster connections for a lifetime. Join us for up-to-the-minute updates on:*

- CounselPro™
- Academy Platforms and Websites
- Online Marketing Campaigns
- Webinars and Seminars
- Zapier Implementation

**Speakers:** Robert Armstrong, Alicia Durante and Rita Chaires

## BREAKOUT SESSIONS

2:45pm–3:15pm—BREAK

3:15pm–5:00pm

### The Ethics of Representing Clients with Diminished Capacity

*This session will address some of the ethical questions a lawyer may face when representing a client with questionable capacity.*

*Participants Will:*

- Be introduced to Rules of Professional Conduct, Ethical Opinions, and laws providing guidance on representing clients with diminished capacity;
- Take away strategies for assessing and accommodating clients with disabilities and maximizing client decision-making capacity;
- Share strategies, policies, and practices for maintaining conventional lawyer-client relationships with impaired clients.

**Speaker:** Nancy Maurer, *Professor at Albany Law School*

3:15pm–5:00pm

### Modernizing Your Practice

*Are these time sucks, sucking the life out of your firm? Learn how to leverage technology and tools to maximize efficiency in your firm and build for the future. In this session, you'll discover how to implement time saving techniques in marketing, workflow, and client communication.*

**Speaker:** Practice Building Coaches

5:30pm–6:30pm—Roundtable Discussion: Implementing Financial Services

*Grant Hall*

**Speakers:** Member Panel

# Sunday, October 17

EDUCATION TRACK (CLE ELIGIBLE)

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TECHNOLOGY TRACK

## MAIN SESSIONS PRESIDENTIAL BALLROOM

## BREAKOUT SESSIONS

8:00am–10:00am

### Quiz Show:

#### Solutions to Common Estate Planning Questions

Join Steve as he walks through common scenarios and their solutions. We'll look at taxable estates, non-taxable estates, funding issues, and even Medicaid issues.

**Speaker:** Steve Harnett

8:00am–10:00am

### Office Hours

This is an opportunity for you and your team to schedule one on one time with your Practice Building Coach or Online Marketing Coach to cover any areas of your practice that could use some extra attention. You schedule the time, pick the topic, and come prepared to discuss. Bring any relevant team members with you and get to work!

**Speaker:** OMG and Member Services Teams

10:00am–10:30am—BREAK

10:30am–Noon

#### Planning for Those Without a Taxable Estate

**Speaker:** Steve Hartnett

10:30am–Noon

### Office Hours

**Speaker:** OMG and Member Services Teams

## END OF 2021 FALL SUMMIT

# Sunday, October 17

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## OPTIONAL TRAINING \$195 PER SEAT

1:30pm–3:30pm

### Maximizing with IRAs Including the Impact of SECURE ACT

*Planning and Marketing Opportunities:*

- Benefits of naming a Trust as beneficiary
- Getting maximum income tax stretch
- How to use a Sentry Trust to protect Inherited IRAs against creditors and bankruptcy
- Advantages and disadvantages to using a Conduit Trust
- Difference between accumulation and Conduit Trust
- How a Family Retirement Preservation Trusts (FRPT) converts an Accumulation Trust into a Conduit Trust
- Impact of the SECURE Act

**Speakers:** Steve Hartnett and Tereina Stidd

3:30pm–3:50pm—BREAK

3:50pm–5:00pm

### Maximizing with IRAs Including the Impact of SECURE ACT *Continued*

**Speakers:** Steve Hartnett and Tereina Stidd

## END OF 2021 FALL SUMMIT OPTIONAL TRAINING SESSION