

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

9:00am–11:00am

Matson Money Masterclass
Grant Hall

Speakers: Josh Crawford and Alex Ash, *Matson Money*

10:30am–12:30pm

VIP Guest Meet and Greet
Invitation Only. Contact your PBC if you are interested in attending.
Executive Room

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–3:00pm

Welcome and Opening Ceremony
Presidential Ballroom

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

Speakers: Robert Armstrong and Sanford M. Fisch

3:00pm–3:30pm—BREAK

3:30pm–5:00pm

Keynote Session from Robert Armstrong & Sanford M Fisch
Presidential Ballroom

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
GRANT HALL

6:30am–7:45am

Point Peeps Marketing Breakfast: Open to Everyone
Grant Hall

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

Transforming Your Firm with Investor Coaching

Speakers: Josh Crawford and Member Panel

11:45am–1:30pm

Niche Lunch for Solopreneurs

Sycuan Parlor

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

11:45am–1:30pm

Lunch Break

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

Avoiding & Handling Challenging 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

3:00pm–3:30pm—BREAK

Friday, October 15

EDUCATION TRACK (CLE ELIGIBLE)

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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–6:00pm—BREAK

6:00pm—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)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

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

Hotel restaurant

MAIN SESSIONS PRESIDENTIAL BALLROOM

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.

Speakers: Robert Armstrong and Sanford M. Fisch

BREAKOUT SESSIONS GRANT HALL

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

9:45am–10:15am—BREAK

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: Alicia Durante with support and materials from Emily Possidento, MCM

10:15am–Noon

Managing Money in CounselPro8™

Join this CounselPro8™ 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

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

Noon–1:45pm—LUNCH BREAK

DocuBank New Member Lunch | Board of Governors Lunch in Executive Room

MAIN SESSIONS
PRESIDENTIAL BALLROOM

BREAKOUT SESSIONS
GRANT HALL

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

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 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: Networking
Presidential Ballroom

Speakers: Member Panel

Sunday, October 17

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

MAIN SESSIONS PRESIDENTIAL BALLROOM

BREAKOUT SESSIONS EXECUTIVE ROOM

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

EDUCATION TRACK (CLE ELIGIBLE)

PRACTICE MANAGEMENT AND MARKETING TRACK

TECHNOLOGY TRACK

OPTIONAL TRAINING EXECUTIVE ROOM—\$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