

## 2009 Fall Summit Agenda - San Diego, CA

### Thursday, October 8, 2009 - 1st Global Sessions

8:00 - 9:00 am	Academy Success Stories Speaker: <i>Al Prentice</i>
9:00 - 9:45 am	Sustainable Income Solutions Speaker: <i>Devin Reid, 1st Global Annuity and Insurance Planning Group</i>
9:45 - 10:00 am	BREAK
10:00 - 11:00 am	Surviving Volatility and Thriving In Recovery: A Study of 1st Global's Asset Allocation Models Speaker: <i>Al Prentice</i>
11:00 - Noon	Life Insurance as an Asset Class: Efficiently Funding Trusts Speaker: <i>Bob Petcoff</i>

### Thursday, October 8, 2009 - Main Sessions

1:00 - 2:00 pm	Welcome and Introductions Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>
2:00 - 3:15 pm	State of the Academy Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>
3:15 - 3:30 pm	BREAK
3:30 - 5:30 pm	Younger Next Year: A Guide to Living Like 50 Until You're 80 and Beyond Keynote Speaker: <i>Chris Crowley</i>  Chris Crowley is the co-author (with his friend and leading New York City internist, Henry S. Lodge, M.D.) of the New York Times best seller, <i>Younger Next Year</i> and the follow-on book for women. The books have sold over a half million copies. He spent his 25 year professional career at the New York City law firm, Davis Polk & Wardwell, most of it as a partner in litigation. After retiring and moving to Colorado he came up with the idea for what would become the <i>Younger Next Year</i> books. The books focus on turning back your biological clock so you can grow functionally younger every year, and continue to live like fifty-year-olds until well into your eighties. To enjoy life and be stronger, healthier, and more alert. To stave off 70% of the normal decay associated with aging (weakness, sore joints, apathy), and to eliminate over 50% of all illness and potential injuries.
6:30 - 9:00 pm	Dinner and Cocktail Reception Sponsored By: <i>Legacy Safeguard</i>

### Friday, October 9, 2009

	MAIN SESSIONS	BREAKOUT SESSIONS
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8:00 - 9:45 am	<p>Online Marketing - Preserve the Core</p> <p>Speaker: <i>Mark Britton</i>, CEO and President, AVVO.com</p>	Attend Main Room Marketing Session
9:45 - 10:00 am	BREAK	
10:00 - Noon	<p>Asset Protection Strategies</p> <p>Speaker: <i>Jay Adkisson</i></p> <p>Nationally known as a leading critic of abusive asset protection and offshore strategies, Jay is the author, along with Mr. Chris Riser, of "Asset Protection: Concepts and Strategies", which is the all-time bestselling book on the topic of asset protection. Jay is a founding partner of Riser Adkisson LLP, with his offices in Southern California, and which firm primarily provides business, tax and estate planning services in certain states and on both coasts.</p>	<p>WOW Marketing Roundtable</p> <p>Facilitators: <i>Member Services</i></p>
Noon - 1:30 pm	LUNCH BREAK	
1:30 - 2:45 pm	<p>How to Make the Funeral Trust a Part of Your Everyday Practice</p> <ul style="list-style-type: none"> <li>▶ Technical Tax Aspects</li> <li>▶ Mechanics of Providing to Clients</li> <li>▶ How Everyone Can Offer This and Why You Should</li> </ul> <p>Speakers: <i>Bryan Adams</i> with <i>Robert Armstrong</i> and <i>Sanford M. Fisch</i></p>	<p>Most Common QuickBooks Mistakes</p> <ul style="list-style-type: none"> <li>▶ Obtain a basic understanding of the alternatives available to fix these errors</li> <li>▶ Learn methods of working efficiently with Quickbooks data files</li> <li>▶ Explore the symptoms and causes of these common mistakes</li> <li>▶ Discover the solutions to eliminate the errors in the future</li> </ul> <p>Speaker: <i>Jim Parker</i>, Certified QuickBooks, ProAdvisor</p>
2:45 - 3:00 pm	BREAK	
3:00 - 4:30 pm	<p>Blueprint to Success in a Niche Market: A Step by Step Process</p> <p>Speakers: <i>Robert Armstrong</i> and <i>Sanford M. Fisch</i></p>	Attend Main Room Marketing Session
6:30 - 9:30 pm	<p>Social Event - \$0 per ticket Sponsored by DocuBank Creating Riches with Niches!</p> <p>San Diego has so much to offer in terms of social activities but we want to focus on making YOUR business successful this year, so we're scrapping the typical social event and having a hands-on session. We're keeping the cost low so you and your entire staff can attend this one of a kind event. We'll focus on Niche Marketing and you'll brainstorm in groups based on the Niche. We want to be sure your creative juices are flowing so we'll have coffee and desserts to power you through the evening. All attendees should not miss this!</p>	

Saturday, October 10, 2009

	MAIN SESSIONS	BREAKOUT SESSIONS
6:45 - 8:00 am	EDUCATION ADVISORY BOARD BREAKFAST	

8:00 - 9:30 am	<p>Success Stories</p> <p>Facilitator: <i>Robert Armstrong</i></p>	Attend Main Room Marketing Session
9:30 - 10:00 am	<p>Maximizing Your Marketing Bang from DocuBank</p> <p>Speaker: <i>Randi Siegel</i></p>	<p>9:30 - 10:30 am</p> <p>Successful Hiring in this Economy and Why to Test Applicants</p>
10:00 - 10:15 am	BREAK	Speaker: <i>Linda Winlock</i> , <i>Personnel Profiling</i>
10:15 - 11:30 am	<p>eLawyering: What Is It, Why Does it Matter and What Do You Do Now?</p> <p>Speaker: <i>Richard Granat</i></p>	<p>10:30 - 11:30 am</p> <p>Generating Referrals</p> <p>Speaker: <i>Jennifer Price</i></p>
11:30 - 1:30 pm	<p>LUNCH BREAK</p> <p>Board of Governors Board Meeting</p> <p>DocuBank New Member Lunch</p>	
1:30 - 3:00 pm	<p>Bombproofing Your Trust: How to Make Sure You Do It Right!</p> <p>Speaker: <i>Bruce Ross</i></p> <p>Bruce Ross is a nationally recognized trial lawyer with over 30 years' experience litigating trust, estate, and conservatorship matters. Mr. Ross co-chairs Holland &amp; Knight's national Private Wealth Services Dispute Resolution Team.</p>	<p>Hands on Workshop - Bring Your 2009 and 2010 Marketing Calendars!</p> <p>▶ By the end of this session your 2010 Marketing Calendar will have a first draft</p> <p>Speakers: <i>Member Services</i></p>
3:00 - 3:15 pm	BREAK	
3:15 - 5:00 pm	<p>Recent Developments Plus Select Topics</p> <ul style="list-style-type: none"> <li>▶ Regaining Capacity</li> <li>▶ Deductibility of Fees in Admin: Estate Tax VS. Income Tax</li> <li>▶ Tax ID # for Trust</li> <li>▶ Estate Tax Update - Legislation</li> </ul> <p>Speaker: <i>Steve Hartnett</i></p>	<p>Website Traffic Reports and "Webvenue"</p> <ul style="list-style-type: none"> <li>▶ Google Analytics</li> <li>▶ Web Tools</li> <li>▶ Updating Your Web Content</li> </ul> <p>Speakers: <i>Dustin Smith</i></p>
5:00 - 5:30 pm	BREAK	
5:30 - 6:30 pm	<p>Roundtable: Non-Owner Compensation Discussion FOR MEMBERS ONLY</p> <p>You MUST submit the <b>STAFFING AND SALARY SURVEY</b> by September 14th to attend this session. For details and to take the survey <a href="#">Click here</a>.</p>	

### Sunday, October 11, 2009 - Main Sessions

8:00 - 10:00 am	<p>Continued Education Program: Probate and Trust Administration - What Every Financial Advisor Needs to Know</p> <p>Speaker: <i>Dennis Sandoval</i></p>
10:00 - 10:15 am	BREAK
	Mastering 1st Consultations - Controlling the Economy in Your Conference Room

## END OF 2009 FALL SUMMIT

## Sunday, October 11, 2009 - Optional Training - \$825 Per Seat

## In the Trenches: Veterans Administration Benefits Aid &amp; Attendance Income Workshop

When you leave this workshop you will be able to:

- Competently advise your client on VA benefits
- Accurately complete a VA claim
- Expand your practice and client base
- Meet the VA's new CLE requirements
- Offer more options to your clients
- Help your clients get health care and MONEY from the VA to pay for health care
- Learn the new Attorney's Fee Regulations

Sunday  
1:00 - 6:00 pm

For this course to qualify for the mandatory 3 hour CLE, the attendees must have applied through the VA for accreditation and must have received their approval notice from the VA prior to taking the course. The application for accreditation is at:

<http://www.va.gov/vaforms/va/pdf/VA21a.pdf> The instructions on where to send the form are in the first paragraph on the first page

Speaker: *Victoria Collier*

Please note: The speaker and the topic have been made possible based on a specific number of members participating at the price offered. Rather than offering this training as a 'nonrefundable session' cancellations of this advanced training will result in a \$325 cancellation fee

## Monday, October 12, 2009 - Optional Training - \$825 Per Seat

## In the Trenches: Veterans Administration Benefits Aid &amp; Attendance Income Workshop Continued

Speaker: *Victoria Collier*

Monday  
8:00 - 5:00 pm

Please note: The speaker and the topic have been made possible based on a specific number of members participating at the price offered. Rather than offering this training as a 'nonrefundable session' cancellations of this advanced training will result in a \$325 cancellation fee

## END OF OPTIONAL TRAINING

## 2009 Fall Summit Sponsors

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