



2009 SPRING SUMMIT - APRIL 23-26

Memphis, TN - The Peabody Hotel

Thursday, April 23, 2009 - 1st Global Sessions

8:00 - 9:15 am	<p>Welcome and Success Stories</p> <p>Speakers: <i>Al Prentice</i></p>
9:15 - 10:00 am	<p>Reducing Market Volatility with Direct Participation Programs</p> <p>Speakers: <i>Al Prentice</i></p>
10:00 - 11:00 am	<p>Solving Long Term Care Needs</p> <p>Speakers: <i>Reed Schnitker</i></p>
11:00 - Noon	<p>Properly Funding Trusts and Estate Planning Needs</p> <p>Speakers: <i>Bob Petcoff</i></p>

Thursday, April 23, 2009 - Main Sessions

1:00 - 2:00 pm	<p>Welcome and Introductions</p> <p>Speakers: <i>Robert Armstrong and Sanford M. Fisch</i></p>
2:00 - 3:15 pm	<p>State of the Academy</p> <p>Speakers: <i>Robert Armstrong and Sanford M. Fisch</i></p>
3:15 - 3:30 pm	BREAK
3:30 - 5:30 pm	<p>The Road to Success & Significance</p> <p>Keynote Speaker: Doug Hanson</p>
6:30 - 9:00 pm	Buffet Dinner and Cocktail Party

Friday, April 24, 2009

	MAIN SESSIONS	BREAKOUT SESSIONS
8:00 - 9:30 am	<p>Additional Opportunities in 1st Consultations</p> <ul style="list-style-type: none"> ➤ Overlooking ILITS ➤ QPRTs ➤ Lifetime QTIPs ➤ PLR 200101021 Trust <p>Speaker: <i>Dennis Sandoval</i></p>	<p>Marketing Roundtable</p> <ul style="list-style-type: none"> ➤ What's Working ➤ Participants: Bring Samples <p>Facilitator: <i>Member Services</i></p>
9:30 - 10:45 am	<p>Using Legacy Wealth Planning to Meet the Needs of the Next Generation</p> <ul style="list-style-type: none"> ➤ Understanding 13 of the Distribution Options 	Planning and Conducting Client Seminars

	Speaker: Dennis Sandoval	
10:45 - 11:00 am	BREAK	
11:00 - Noon	The Anatomy of a Financially Successful Academy Law Firm Revisited (Members Only) Speaker: Sanford M. Fisch	Starter Kit Unpacking - See New Tools You Can Use! ▶ Look at a new starter kit and identify what you need to update in your office ▶ Think about what you're using and not using in this session Speakers: Susan Russel and Lillian Valdez
Noon - 2:00 pm	LUNCH BREAK Financial Database Open to Participating Members Only	
2:00 - 3:00 pm	Funeral Trusts: Untapped Market with Unlimited Potential Speakers: Robert Armstrong, Sanford M. Fisch, and Bryan Adams	Attend Main Room Marketing Session
3:00 - 3:45 pm	Legacy Wealth Planning Speakers: Robert Armstrong and Sanford M. Fisch	Effective Use of Promotional Products Facilitators: Member Services Member offices and vendors will share samples
3:45 - 4:00 pm	BREAK	
4:00 - 5:00 pm	Member Success Stories Facilitator: Robert Armstrong	Attend Main Room Practice Building Session
5:45 pm	Social Event - \$105 per ticket Tour and Dinner at Graceland Includes a Tour of the Mansion, Airplane Museum, Sincerely Elvis Museum and a Southern Dinner inside the Automotive Museum	

Saturday, April 25, 2009

	MAIN SESSIONS	BREAKOUT SESSIONS
6:45 - 8:00 am	EDUCATION ADVISORY BOARD BREAKFAST	
8:00 - 10:00 am	Estate Planning Tools in a Low Interest Rate Environment ▶ Interest rates are down, GRITS, GRATS, GRUTS Speaker: Steve Hartnett	8:00 - 9:45 am Top Ten Shortcuts to Avoid Facilitator: Member Services
		9:45 - 10:00 am BREAK
		10:00 - 11:00 am Post Seminar Follow-Up Procedures Speaker: Jennifer Price
10:00 - 10:15 am	BREAK	

10:15 - Noon	Overview of Asset Protection Strategies for Doctors and Dentists: Continuing Education Course for Financial Professionals Speakers: <i>Dennis Sandoval</i>	11:00 - Noon Initial Consultation Workflow for Staff Speakers: <i>Susan Russel and Lillian Valdez</i>
Noon - 2:00 pm	LUNCH BREAK Board of Governors Board Meeting Docubank New Member Lunch	
2:00 - 3:30 pm	Marketing in This New Emerging Economy ▶ Tools and Strategies for Success Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>	Attend Main Room Marketing Session
3:30 - 4:00 pm	BREAK	
4:00 - 5:00 pm	Social Networking ▶ What is it and what's it worth to you? Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>	The Magic of eAlerts and Website Marketing Speakers: <i>Susan Russel and Lillian Valdez</i>
5:00 - 5:30 pm	BREAK	
5:30 - 6:30 pm	ROUNDTABLE DISCUSSION FOR MEMBERS ONLY Trust Administration: Quoting Fees and Retaining Cases	
7:00 pm	PEAK PERFORMER DINNER For Applicants and Participants	

Sunday April 26, 2009 - Main Sessions

8:00 - 9:00 am	Protecting the Institutionalized Spouse - Medicaid Planning Using the Testamentary Special Needs Trust Speaker: <i>Steve Hartnett</i>
9:00 - 10:00 am	Are You Missing the Market? Adding Special Needs to your Practice Speaker: <i>Dennis Sandoval</i>
10:00 - 10:15 am	BREAK
10:15 - Noon	Medicaid Planning Under DRA: The Medicaid Irrevocable Income Only Trust Speaker: <i>Steve Hartnett</i>
END OF 2009 SPRING SUMMIT	

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