

[[Back to Member-Only Site](#)]



[Home](#) | [Registration](#) | [Agenda](#) | [Hotel/Travel](#) | [Social](#) | [Sponsors/Exhibitors](#)

2013 Spring Summit - Philadelphia, PA

Quick Links:

- › [Wednesday, April 24: MPS Training](#)
- › [Wednesday, April 24: Boot Camp](#)
- › [Thursday, April 25: Boot Camp](#)
- › [Thursday, April 25: Main Sessions](#)
- › [Friday, April 26: Main and Breakout Sessions](#)
- › [Saturday, April 27: Main and Breakout Sessions](#)
- › [Sunday, April 28: Main and Breakout Sessions](#)
- › [Printer Friendly Version](#)

Topic Legend:

- › **PM** - Practice Management
- › **ED** - Education
- › **MKTG** - Marketing
- › **S** - Software

Wednesday, April 24, 2013 - MPS Medicaid Workshop

[Click here](#) for agenda

Wednesday, April 24 thru Thursday, April 25

[Click here](#) for agenda

Thursday, April 25, 2013

Main Sessions

	WELCOME TO THE 20TH ANNIVERSARY SPRING SUMMIT!
1:00 pm - 2:00 pm	INTRODUCTIONS Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>
2:00 pm - 3:15 pm	Celebrating the Past and Creating the Future Speakers: <i>Robert Armstrong and Sanford M. Fisch</i>
3:15 pm - 3:30 pm	BREAK
3:30 pm - 5:00 pm	Keynote Topic: The Lighthouse in the Storm: Our New Role in Turbulent Times Keynote Speaker: Frank Maselli, The Maselli Group
7:00 pm - 9:00 pm	20TH ANNIVERSARY GALA RECEPTION Cocktails and Dinner Served <i>Dinner Sponsored by: Legacy Safeguard (Premier Planning and NGL)</i> <i>Cocktails and Photographer Sponsored by: DocuBank</i> Formal Attire

Friday, April 26, 2013

	Main Sessions	Breakout Sessions
8:00 am - 9:45 am	<p>PM TOPIC The Academy's Reinvention: A Blueprint for the Next 20 Years Speakers: Robert Armstrong and Sanford M. Fisch</p>	STAFF IN MAIN ROOM
10:00 am - 10:15 am	BREAK	
10:00 am - 11:30am	<p>PW/MKTG TOPIC Financial Services and You Speaker: Mark Matson, <i>Matson Money</i></p>	<p>MKTG TOPIC 10am - 11am BizActions E-Newsletter Demo Speaker: Robert Slavitt, <i>BizActions</i></p>
11:30 am - Noon	<p>PW/MKTG TOPIC Financial Services and You, Continued Speakers: Robert Armstrong and Sanford M. Fisch</p>	<p>MKTG TOPIC 11am - Noon SEO - The Latest in Content Marketing</p> <ul style="list-style-type: none"> ▶ Infographics ▶ Slide decks <p>Speaker: Rita Chaires</p>
Noon - 2:00 pm	<p>LUNCH BREAK Financial Database Meeting Open to Participating Owners Only</p>	
2:00 pm - 3:30 pm	<p>ED TOPIC Asset Protection: Staying Out of Trouble! Speaker: Gideon Rothschild, <i>Moses & Singer, LLP</i></p>	<p>S TOPIC COUNSELPRO™ 6A Marketing Expense Budgets/Events</p> <ul style="list-style-type: none"> ▶ Why it is important to create Monthly Marketing Expense Budgets ▶ What to capture under Marketing Expense Budget - "YOUR BOTTOM LINE" ▶ What is a Marketing Referral Source ▶ How referrals are tracked inside the program ▶ Setting up seminars - what qualifies as an Event ▶ Non-seminar Events <p>Speaker: Donna Hooper</p>
3:30 pm - 3:45 pm	BREAK	
3:45 pm - 5:00 pm	<p>ED TOPIC Top 12 Significant, Curious, or Downright Fascinating Fiduciary Cases of 2012* *At least, it seems to us. Your mileage may vary. Speaker: Dana Fitzsimons, <i>Bessemer Trust</i></p>	<p>S TOPIC COUNSELPRO™ 6A Seminar Reservations and Tracking Seminar Results Using Wizards</p> <ul style="list-style-type: none"> ▶ Seminar reservations and tracking seminar results using wizards ▶ Once the results are in, which reports you need to use ▶ How to read and understand the report results <p>Speaker: Donna Hooper</p>
5:30 pm	<p>SOCIAL EVENT: Sights and Sounds of Philadelphia With historical landmarks and century old tales around every corner, Philadelphia is the ideal city to see with a local expert. Who better to guide us around town than Philadelphia Sightseeing Tours! We'll finish the evening with dinner overlooking the city at R2L. \$135 per person (non-refundable)</p>	

Saturday, April 27, 2013

	Main Sessions	Breakout Sessions
6:45 am - 8:00 am	Board of Governors Breakfast	
8:00 am - 10:00 am	<p>PWM TOPIC Success Stories</p> <p>Facilitators: Robert Armstrong and Sanford M. Fisch</p>	<p>S TOPIC COUNSELPRO™ 6A Getting Ready to Prepare the Estate Planning Documents</p> <ul style="list-style-type: none"> ▶ Streamlining the process of document creation ▶ Ways to increase document creation productivity ▶ Setting defaults in the program ▶ Using the COPY feature <p>Speaker: Donna Hooper</p>
10:00 am - 10:15 am	BREAK	
10:15 am - Noon	<p>PWMKTG TOPIC Maximizing the Funding and Risk Assessment Meeting</p> <p>Speakers: Robert Armstrong, Sanford M. Fisch, and Bryan Adams with Premier Planning</p>	<p>S TOPIC COUNSELPRO™ 6A Tracking the Results from an IC appointment</p> <ul style="list-style-type: none"> ▶ Client Retention Wizard ▶ Document tracking ▶ New client follow-up ▶ Companies ▶ Follow-up for those not retained ▶ Types of letters to send and when to send them <p>Speaker: Donna Hooper</p>
Noon - 2:00 pm	<p>LUNCH BREAK</p> <p>Board of Governors Board Meeting DocuBank New Member Lunch</p>	
2:00 pm - 3:15 pm	<p>ED TOPIC Ethics Challenges Posed by Transfers Among Family Members</p> <p>Speakers: Steve Hartnett</p>	<p>S TOPIC COUNSELPRO™ 6A Getting the Most Efficiency from your Software</p> <ul style="list-style-type: none"> ▶ Database maintenance ▶ Purging old estate plans ▶ Cleaning up the database manually for duplicates ▶ Categorizing people for the most efficiency ▶ Which reports you should be using ALL of the time <p>Speaker: Donna Hooper</p>
3:15 pm - 3:30 pm	BREAK	
3:30 pm - 5:00 pm	<p>PWS TOPIC Optimizing Your Funding</p> <ul style="list-style-type: none"> ▶ Funding Basics ▶ Funding in CounselPro™ <p>Speakers: Dennis Sandoval, Steve Hartnett, Donna Hooper and Randy Harwick</p>	<p>M TOPIC Marketing Roundtable</p> <p>Facilitators: Member Services</p>
5:00 pm - 5:30 pm	BREAK	
5:30 pm - 6:30 pm	<p>ROUNDTABLE DISCUSSION</p> <p>TOPIC: TBA</p>	
6:45 pm	<p>PEAK PERFORMER DINNER</p> <p>Welcome, for New and Returning Members</p> <p>If you are interested in attending, please contact your PBC</p> <p>Click here for more information on the Peak Program</p>	

Sunday, April 28, 2013

	Main Sessions	Breakout Sessions
8:00 am - 10:00 am	<p>ED TOPIC Portability: To Elect or Not To Elect, That Is the Question Speaker: Steve Hartnett</p>	<p>S TOPIC COUNSELPRO™ 7 UPDATE What's New and In Development</p> <ul style="list-style-type: none"> ▶ The newest features of CounselPro 7.0 ▶ Participants provide input and suggestions for development! <p>Speaker: Donna Hooper</p>
10:00 am - 10:15 am	BREAK	
10:15 am - Noon	<p>ED TOPIC Avoiding Disaster: Drafting Accumulation Trusts (especially SNTs) as Beneficiaries of Retirement Plan Benefits Speaker: Dennis Sandoval</p>	<p>S TOPIC COUNSELPRO 6A™ One-On-One with Support</p> <ul style="list-style-type: none"> ▶ Q&A format - open for the membership ▶ We will address your questions individually (except customization of estate planning document language) ▶ Bring a laptop with CounselPro 6A™ installed <p>Speaker: Donna Hooper, Randy Harwick and Jeff Davis</p>
End of 2013 Spring Summit		

[\[back to top of page\]](#) [\[printer friendly version\]](#)