

Tuesday, October 22

Wednesday, October 23

Thursday, October 24

Friday, October 25

8:00 AM
-
8:50 AM

FIRM INTRODUCTIONS & KEYNOTE

INNOVATING LWP'S HORIZONS:
EXPLORING THE ROLE OF THE
INNOVATION COMMITTEE

8:50 AM - 9:50 AM | BREAK

MAXIMIZING TRUST FLEXIBILITY:
STRATEGIES FOR TRUST MODIFICATION
AND OPTIMIZATION

ADVANCING LWP PRODUCTS:
UNVEILING UPDATES AND
FUTURE INNOVATIONS

ANNUAL PLANNING RETREAT:
SETTING THE COURSE
FOR SUCCESS!

7:30 AM - 10:30 AM
BON VOYAGE BREAKFAST:
A DELICIOUS SEND-OFF

9:00 AM
-
10:15 AM

9:00 AM
-
10:15 AM

10:15 AM - 10:30 AM | BREAK

10:30 AM
-
11:30 AM

COMBATING SOCIAL ENGINEERING:
CYBER SECURITY BEST PRACTICES
AND AWARENESS TRAINING

EMPOWER YOUR SOLO PRACTICE:
HARNESSING CONFIDENCE
AND LWP TOOLS FOR SUCCESS

10:30 AM
-
11:30 AM

OPTIMIZING MARKETING ROI:
TRACKING EFFORTS WITH ACTIONSTEP

STUCK IN THE NEST: HELPING FAMILIES
PLAN FOR YOUNG ADULTS UNABLE TO
MOVE INTO SUCCESSFUL AND
INDEPENDENT ADULTHOOD

11:30 AM - 1:00 PM | LUNCH

1:00 PM
-
2:15 PM

MASTERING TRUST ADMINISTRATION:
STRATEGIES, TAX PLANNING,
AND COMMUNICATION

NAVIGATING THE SECURE ACT:
EXPLORING PLANNING OPTIONS
FOR FINANCIAL SECURITY

1:00 PM
-
2:15 PM

UNLOCKING CLIENT ENGAGEMENT:
THE POWER OF WORKSHOPS
IN THE LWP PROCESS

THE WHITE GLOVE EXPERIENCE:
INSIGHTS FROM FIRMS IN
CLIENT SATISFACTION

2:15 PM - 2:30 PM | BREAK

2:30 PM
-
3:45 PM

TRANSFERRING MORTGAGED
PROPERTIES TO IPUG TRUSTS

ESTATE PLANNING INSIGHTS:
EXPLORING FUNERAL PLANNING
STRATEGIES AND OPPORTUNITIES

2:30 PM
-
3:45 PM

ELEVATE YOUR FIRM:
UNLEASHING YOUR UNIQUENESS
IN THE MARKETPLACE

UNVEILING KOLBE AND
STRENGTHSFINDER: NAVIGATING THE
INTERSECTION OF ACTION & FEELING

COACHING SESSION:
DEFINING YOUR GOALS, ROLE,
AND MOTIVATION
(MEMBERS ONLY)

3:45 PM - 4:00 PM | BREAK

4:00 PM
-
5:15 PM

MASTERING TASK NAVIGATION:
PRIORITIZATION, URGENCY,
AND PROJECT TIME

ATTORNEY ROUNDTABLE:
COLLABORATIVE SOLUTIONS
AND INSIGHTS

4:00 PM
-
5:15 PM

SECURING YOUR WEALTH:
STRATEGIES FOR FUNDING AN
ENHANCED ASSET PROTECTION TRUST

TEAM-BUILDING ADVENTURE:
SCAVENGER HUNT EXCURSION

