

	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	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		8:50 AM - 9:00 AM BREAK		
9:00 AM - 10:15 AM		MAXIMIZING TRUST FLEXIBILITY: STRATEGIES FOR TRUST MODIFICATION AND OPTIMIZATION		
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	COACHING SESSION: DEFINING YOUR GOALS, ROLE, AND MOTIVATION (MEMBERS ONLY)	
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		
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		

