

2004

California Forum Meeting

Friday, January 30, 2004

8:00am –7:00pm

- 8:00 – 8:30 Welcome
- 8:30 – 9:30 Collaborative Planning for the Small Business Owner (Alex Matuk and Greg Banner)
- 9:30 – 11:00 Staying Ahead of the Pack (David Cahoon & Vito Lanuti)
- 11:00 – 12:00 Family Limited Partnership (John Donaldson & Danny Wexler)
- 12:00 – 1:00 Lunch
- 1:00 – 2:00 Practice Management: Building a Fulfillment Team (Mark Merenda & Joe Strazzeri)
- 2:00 – 3:00 Medi-Cal Update (Steve Mancini & Eleanor Minsky)
- 3:00 – 4:00 1031 Exchange Update (Peggy Lombardo, John Jenkins)
- 4:00 – 5:00 Wine & hors d'oeuvres reception
- 5:00 – 7:00 Dinner

California Forum Meeting

Saturday, January 31, 2004

8:00am –4:30pm

- 8:00 – 8:30 Welcome
- 8:30 – 9:30 Counselware™ (Network Staff)
- 9:30 – 10:30 Planning Pro™ (Mike Jones of Advanced Planning Solutions)
- 10:30 – 11:30 WealthDocs (Lew Dymond of WealthCounsel, LLC)
- 11:30 – 12:30 Lunch with PBO Solutions, LLC (Berny Rethore and Lewis Treistman)
- 12:30 – 1:30 TrustIt (Scot Overdorf of TrustIt, LLC)
- 1:30 – 2:30 Shredding the Paper Myth (Scot Overdorf of TrustIt, LLC)
- 2:30 – 3:30 Settlement Pro™ and Funding Pro™ (Mike Jones of Advanced Planning Solutions)
- 3:30 – 4:30 Social Hour