



WEDNESDAY (12/4)

# WEDNESDAY

5:00 – 6:00 PM

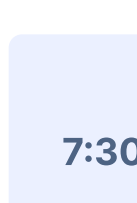
Registration Table Open

1 hour

6:00 – 8:00 PM

Welcome Reception

2 hours



THURSDAY (12/5)

# THURSDAY

7:30 – 8:30 AM

Check-in

1 hour

8:30 – 9:30 AM

**MAIN STAGE**  
Building the American Dream and Trifecta Case Studies

1 hour

9:30 – 10:30 AM

**MAIN STAGE**  
What's Your Pitch? with Forbes Riley

1 hour

10:30 – 11:00 AM

Break *Coffee & Snacks*

30 mins

11:00 – 12:00 PM

Breakout Sessions

1 hour

**TRACK 1** BUILDING AN ADVISORY PRACTICE

Building a Tax Advisory Practice: Pricing and Engagement Letters

**TRACK 2** TAX & LEGAL FOUNDATIONS

Estate Planning, Unique Assets, and the Benefits of a Revocable Living Trust

**TRACK 3** ADVANCED INSIGHTS

Mastering Multi-Entity Legal Structuring and Tax Reporting with the 1065 and 1120S

12:00 – 1:30 PM

Patio Lunch (Premium & VIP)

1 hour 30 mins

1:00 – 1:30 PM

Meet & Greet with Mark

30 mins

1:30 – 2:30 PM

Breakout Sessions

1 hour

**TRACK 1** BUILDING AN ADVISORY PRACTICE

Transitioning Compliance Clients to Advisory All Year Long

**TRACK 2** CORE STRATEGIES

The Truth About Annuities, Reverse Mortgages and Life Insurance

**TRACK 3** ADVANCED INSIGHTS

Advanced Issues When Navigating Payroll Needs for Your Clients, and Managing the Payroll Process In or Out of House

2:30 – 2:45 PM

Break

15 mins

2:45 – 3:45 PM

Breakout Sessions

1 hour

**TRACK 1** BUILDING AN ADVISORY PRACTICE

Mastering the Comprehensive Consultation and Working as a Team for Your Client

**TRACK 2** CORE STRATEGIES

Utilizing the RE Professional Strategy: Balancing LT, ST, and Self Rentals with Mastering the Material Participation Rules

**TRACK 3** ADVANCED INSIGHTS

Leading Edge Tax Strategies for the Wealthy 1%, and Where Are They Reported on the Tax Return

3:45 – 4:00 PM

Break

15 mins

4:00 – 5:00 PM

**MAIN STAGE**  
2025 Update in Self-Directing, and 3 Case Studies Funding Alternative Assets With Retirement Accounts with Mat Sorensen

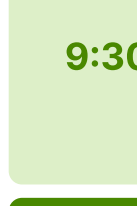
1 hour

6:00 – 9:00 PM

**VIP Experience**

Casino Royal  
*Cocktails, Dinner, and Gambling*

3 hours



FRIDAY (12/6)

# FRIDAY

8:30 – 9:30 AM

**MAIN STAGE**  
The Hot and Controversial Debate: Roth IRA Versus Cash Value Life Insurance with Special Guests

1 hour

9:30 – 10:30 AM

**MAIN STAGE**  
The Power of Money Mindset in You and Your Client's Quest for Success with Expert Panel

1 hour

10:30 – 11:00 AM

Break / Meet & Greet with Mark

30 mins

11:00 – 12:00 PM

Breakout Sessions

1 hour

**TRACK 1** BUILDING AN ADVISORY PRACTICE

Recruiting, Hiring, and Training Team Members in a Professional Practice

**TRACK 2** CORE STRATEGIES

Asset Protection: The Cost-Benefit Analysis and What Actually Works

**TRACK 3** ADVANCED INSIGHTS

Maximizing Depreciation Strategies: Navigating Section 179, Bonus Depreciation, and MACRS

12:00 – 1:30 PM

Patio Lunch (Premium & VIP Women's Panel)

1 hour 30 mins

1:30 – 2:30 PM

**MAIN STAGE**  
High Net Worth Tax Planning Case Study with Forms and Flow

1 hour

2:30 – 2:45 PM

Break

15 mins

2:45 – 3:45 PM

Breakout Sessions

1 hour

**TRACK 1** BUILDING AN ADVISORY PRACTICE

Building Connection for a Lasting Client Advisory Relationship

**TRACK 2** CORE STRATEGIES

Designing a Tax Strategy and Building a Tax Savings Plan From Start to Finish

**TRACK 3** ADVANCED INSIGHTS

Advanced Planning When Helping a Client Buy or Sell a Business: Pitfalls and Reporting on Form 4797

3:45 – 4:00 PM

Break

15 mins

4:00 – 5:00 PM

Breakout Sessions

1 hour

**TRACK 1** BUILDING AN ADVISORY PRACTICE

The Integrated Marketing Plan and Choosing the Proper Marketing Mix to Grow Your Practice

**TRACK 2** CORE STRATEGIES

Retirement Plan Strategies A-Z: Which Plan is Best for a Type of Business Owner or Investor

**TRACK 3** ADVANCED INSIGHTS

State Tax Apportionment AND Reporting When Clients Invest In, or Have Income from Multiple States

6:00 – 9:00 PM

Denim & Diamonds

3 hours



SATURDAY (12/7)

# SATURDAY

8:00 – 9:15 AM

VIP Breakfast

1 hour 15 mins

9:15 – 9:30 AM

Break

15 mins

9:30 – 10:30 AM

**MAIN STAGE**  
S-CORPORATION Basics to Advance Issues: Why, How, Where and When!

1 hour

10:30 – 11:00 AM

Break *Coffee & Snacks*

30 mins

11:00 – 12:00 PM

Breakout Sessions

1 hour

**TRACK 1** BUILDING AN ADVISORY PRACTICE

Executing the Perfect Year-End Tax Planning Session with Your Clients and a Power Checklist

**TRACK 2** CORE STRATEGIES

IRS Resolution Basics and Dealing With Your Client and the IRS Effectively

**TRACK 3** ADVANCED INSIGHTS

Death of a Taxpayer, Settling an Estate, and the 1041 Trust Tax Return

12:00 – 1:30 PM

Patio Lunch (Premium & VIP)

1 hour 30 mins

1:00 – 1:30 PM

Meet & Greet with Mark

30 mins

1:30 – 2:30 PM

Breakout Sessions

1 hour

**TRACK 1** BUILDING AN ADVISORY PRACTICE

Scaling Your Advisory Practice and Facing Break Points While Growing

**TRACK 2** CORE STRATEGIES

Writing-Off Every Medical Expense and Insurance: 105 Plans for Small and Medium Sized Businesses

**TRACK 3** ADVANCED INSIGHTS

Netting Gains & Losses for Maximum Benefit on the 1040: Unravelling Passive, Ordinary, Real Estate, & Investment Income with Capital Gains and Losses

2:30 – 3:00 PM

Break *Coffee & Snacks*

30 mins

3:00 – 4:00 PM

**MAIN STAGE**  
Succeeding in 2025 and Final Takeaways & Drawings for Passport Winners

1 hour