WEDNESDAY (12/4)

5:00 – 6:00 PM	**Registration Table Open**	*1 hour*
6:00 – 8:00 PM	**Welcome Reception**	*2 hours*

THURSDAY (12/5)

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)

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: **Cracking the Code: The Marketing Matrix for Business Growth** 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)

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-Corporations 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 Suceeding in 2025 and Final Takeaways & Drawings for Passport Winners	*1 hour*