

PROGRAM AGENDA

May 4-6, 2023
 Marriott Aloft Dallas Euless

THURSDAY, MAY 4TH

ALOFT XYZ LOUNGE (LOBBY)

6:00pm – 8:00pm

WELCOME RECEPTION (including appetizers and refreshments)

- Fantastic opportunity to meet fellow attendees and network, while also meeting Philip Kavesh, Kristina Schneider & UEP Staff

FRIDAY, MAY 5TH

ALOFT EX-CHANGE ROOM

7:00am – 8:00am

BREAKFAST (included)

8:00am – 12:00pm

PRACTICE SYSTEMS, PROCESSES & INFRASTRUCTURE

- A powerful walk-through of the life of a client from A through Z and begin building your own Client Service Process for your firm
- Developing the essential infrastructure to properly support and staff, including how to hire, train and manage support staff effectively
- Time management and how to avoid constant interruptions and distractions
- How to better organize yourself, your workspace and your calendar to maximize efficiency
- Setting your estate planning fees so that you actually make a profit and can properly build the necessary infrastructure (and pay yourself, too!)
- The metrics and accountability that every attorney business owner needs to properly monitor evaluate to properly manage the practice!

12:00pm – 1:30pm

LUNCH (included)

1:30pm – 5:30pm

SUCCESSFUL MARKETING STRATEGIES

- The most common marketing mistakes that estate planning attorneys are making in their practice - - and how to avoid them!
- The #1 most overlooked marketing strategy (that has the potential to make up over 50% of your firm's annual revenue!)
- How to utilize the internet and social media to develop new clients (without wasting a lot of money with a lot of services and systems that promise you results!)
- Despite what some may say, why seminars are still the best strategy for funneling your prospects to you and how to effectively conduct seminars in a post-COVID world - - so you aren't wasting your time and are actually making real money!

8:00am – 8:30am

BREAKFAST (included)

8:00am – 12:00pm

MOCK LIVING TRUST SEMINAR & SEMINAR PRESENTATION TECHNIQUES

- Including seminar check-in process and review of seminar room setup
- Living Trust Seminar Presentation Techniques
- Appointment Booking Process and Seminar Close
- At the conclusion of the seminar, each attendee will have the opportunity to book a complimentary 30-minute post-event implementation session

ATTENDEE PERSONAL CONSULTATIONS BEFORE THE GROUP

- Each attendee will receive a personalized “hot seat” before the group to discuss your biggest practice challenges
- Opportunity for all in attendance to learn from one another (at various stages of their careers)

12:00pm – 1:30pm

LUNCH (included)

1:30pm – 5:00pm

ATTENDEE PERSONAL CONSULTATIONS BEFORE THE GROUP (CONTINUED)**DEVELOPING YOUR CUSTOM ACTION PLAN**

- Putting together a specific implementation plan of what you learn - - so that you can hit the ground running and get the most out of this program!

FINAL Q&A AND PROGRAM WRAP-UP

DON'T BOOK YOUR RETURN TRIP HOME BEFORE 8PM

ABOUT THE SPEAKERS



PHILIP KAVESH is a nationally recognized attorney, authority, speaker, educator and technical innovator in estate planning.

Phil has earned significant recognition and accolades over his 40+ years of practice as an estate planning attorney. Phil holds a Master Degree (LL.M.) in Tax Law and is a California State Bar Certified Specialist in Estate Planning, Trust and Probate Law. His law firm, Kavesh, Minor & Otis is one of the largest estate planning law firms in Southern California, having prepared over 10,000 estate plans and administered over 4,000 plans after clients have passed away.

In more recent years, Phil has focused his time and efforts imparting his experience in running a successful law practice (that's still in business today!) to his attorney colleagues through The Ultimate Estate Planner, Inc. and programs like The Ultimate Level™.



KRISTINA SCHNEIDER is a Practice Success Coach for The Ultimate Estate Planner, Inc. and has been working side-by-side attorney, Philip Kavesh, for over 18 years. Having served as Phil's Executive Assistant and been involved with his law firm's marketing and with upper-level management decisions, Kristina has been able to train and coach attorneys (and their staff) across the country on the tested and proven systems developed in Phil's successful law practice.

Kristina graduated from Pepperdine University with a BS in Business Administration and is currently pursuing her MBA degree from Pepperdine Graziadio Business School.

She brings a lot of direct experience having worked “in the trenches” in the law firm and can help firms address issues from the staff perspective.