

FREQUENTLY ASKED QUESTIONS

October 9-11, 2024 | Austin, Texas

QUESTION: What is your refund/cancellation policy?

ANSWER: We have a 45-day cancellation policy to receive a full refund of your registration fee. You have up until August 25, 2024 to cancel your registration and receive a full refund. Should you or The Ultimate Estate Planner, Inc. (“UEP”) find another firm to register for the event in your place, UEP may extend a partial or full refund of your registration fee or the option to transfer your registration to another 2024 event.

QUESTION: Where should attendees stay and do you have a group discount at the hotel?

ANSWER: The event is taking place at The Otis Hotel in Austin, TX. Once you are registered, you will receive more information on how to book your hotel room. We have a discounted room block and you have up until September 18, 2024 to book your hotel room at The Otis with our discount.

QUESTION: When should I plan on arriving?

ANSWER: On Wednesday, October 9th, we are hosting a Welcome Reception from 5pm to 7pm at The Otis Hotel (exact location TBD), which will include appetizers and drinks. This is a great opportunity to meet UEP staff, as well as your fellow colleagues in attendance. The hotel is located approximately 30 minutes from Austin-Bergstrom International Airport, so if you are flying into Austin, arriving sometime around 4pm at the latest would be a great timeframe to ensure enough time to get to the hotel, check-in and get settled into your hotel room before joining us downstairs in the lobby/bar area.

QUESTION: What time do you recommend leaving?

ANSWER: On the final day, Friday, October 11th, we do intend to go the full day until 5pm. The afternoon includes your individual consultation before the group and an interactive implementation session, which you won't want to miss! If you are flying home, we recommend that you book a return flight on Saturday (or stay through the weekend and leave on Sunday). However, if you wish to return home on Friday, we do not recommend booking your flight any earlier than 8pm local time to ensure you can reasonably get to the airport on time.

QUESTION: What's included with my registration?

ANSWER: The Welcome Reception (with appetizers and drinks), Breakfast and Lunch on Thursday and Friday, live presentation all day on Thursday and Friday, and a personal, customized consultation held before the group on Friday afternoon. You are responsible for your travel to/from the event, hotel and lodging, dinners and any incidentals.

QUESTION: I see that I can add staff or associate attorneys to my registration for a significantly reduced fee. Any guidance on who is best to attend with me and how late do I have to register any additional members of my firm?

ANSWER: YES! Those that have brought key staff members from their firm have gotten a lot more from this program, because you get the input and the “buy-in” from the other members in your team and you aren't having to try and explain and decipher your notes and all that you learned when you get back to the office. Typically, most people bring Office Managers, Assistants, Paralegals, Associate Attorneys and Marketing Coordinators. Anyone that may play a role in your firm in terms of setting up of systems, processes, and infrastructure. You can register additional members of your firm as late as September 11, 2024 (subject to availability/capacity).