

Practice Management Workshop
Florida Society of Enrolled Agents
2015 Agenda

Jeffrey A. Schneider, EA, CTRS, NTPI Fellow
FSEA Education Committee Chair & Event Facilitator

Friday, August 14th, 2015

1:00PM – 1:30PM	Agenda/Introductions
1:30PM – 3:10PM	Public Relations and Social Media – Jerry Gaddis, EA, NTI Fellow
3:10PM – 3:30PM	Break
3:30PM – 5:10PM	Engagement & Disengagement Letters & Conflict of Interest Issues – Taylor Pancake, Attorney at Law
5:10PM – 5:30PM	Q&A

Dinner on our own

Saturday, August 15th, 2015

7:00AM – 8:00AM	Breakfast (for hotel guests)
8:00AM – 9:40AM	Insurance and the Practice – E&O, GL & WC – P Chris Sanders, Aegis Insurance Group
9:40AM – 10:00AM	Break
10:00AM – 11:40AM	Internships And Mentoring – Andy Stadler, EA, NTPI Fellow (NAEA Director & Indiana Society of EAs' President)
11:40AM – 12:00PM	Q&A
12:00PM – 1:00PM	Lunch
1:00PM – 2:40PM	Succession Planning and Buy/Sell Arrangements and Related Issues – James Flick, Flick Law Firm
2:40PM – 3:00PM	Break
3:00PM – 4:40PM	Branding & Local SEO Marketing – Mike Campolattano – Purple Moon Media
4:40PM – 5:30PM	Effective Time Management – Jeffrey A. Schneider, EA, CTRS, NTPI Fellow, (NAEA Director and Past FSEA President (2013/2014))

Dinner in the Atrium

Sunday, August 16th, 2015

7:00AM – 8:00AM	Breakfast (for hotel guests)
8:00AM – 10:00AM	Data Book & Burning Questions
10:00AM – 10:20AM	Break
10:20AM – 11:30AM	Data Book & Burning Questions
11:30AM – 12:00PM	Discussion Wrap-Up