

2018 Convention Breakout Schedule

MONDAY

TUESDAY

| ROOM | 2:30 - 3:10 | 3:20 - 4:00 | 4:10 - 4:50 | 5:00 - 5:40 | ROOM | 9:00 - 9:40 | 9:50-10:30 | 10:40-11:20 | 11:30-12:10 | 12:20 - 1:20 | 1:30 - 2:10 | 2:20-2:50 | 3:00-3:30 | 3:40-4:10 | 4:20-4:50 | 5:00-5:30 | ROOM |
|--------------------------------|----------------|----------------|----------------|----------------|--------------------------------|--|--|---|--|--------------|--|--|--|---|---|--|--------------------------------|
| Granby A | | | | | Granby A | Unit Economics | | Unit Economics | | LUNCH | Unit Economics | | | | | | Granby A |
| Granby B | | | | | Granby B | Take the Next S.T.E.P. with our Star Tax Education Program! | | How Engagement Drives Profit & Growth with Bob Gappa | How Engagement Drives Profit & Growth with Bob Gappa | LUNCH | Take the Next S.T.E.P. with our Star Tax Education Program! | | | | | | Granby B |
| Granby C | | | | | Granby C | Closing the Sale | | Build a Better Business by Executing Tax Talks | | LUNCH | Closing the Sale | | Build a Better Business by Executing Tax Talks | | Steps to Build Your Performance Driven Marketing Plan | | Granby C |
| Granby D | | | | | Granby D | Soci | | Soci | | LUNCH | | | | | | | Granby D |
| Granby E | | | | | Granby E | CE CREDIT: Tax Cuts and Jobs Act (TCJA) for Individuals | | | | LUNCH | | | | | | | Granby E |
| Energy | #seeyanextyear | #seeyanextyear | #seeyanextyear | #seeyanextyear | Energy 1 | Vendor: World Financial Group Partnership | It Pays to Stay - Strategies for Preparer Retention (Panel and Overview) | | Multiplying Growth - Strategies for Multi-Unit Operators Panel | LUNCH | It Pays to Stay - Strategies for Preparer Retention (Panel and Overview) | | Multiplying Growth - Strategies for Multi-Unit Operators Panel | Vendor: World Financial Group Partnership | Vendor: Wholesaling Payroll Services to Generate Revenue with ADP | Vendor: How to Save BIG \$\$ On This Year's Signage! with Potatohead | Energy |
| | | | | | Energy 2 | Conscious Leadership | Winning Customers for Life! Panel (Customer Retention Strategies) | Winning the Second Half! Panel (Late Season Strategies) | Driving Single-Unit Success Panel (Strategies for Single-Unit Operators) | LUNCH | Winning Customers for Life! Panel (Customer Retention Strategies) | Closing the Sale Panel | New Customer Acquisitions Panel | | Conscious Leadership | Conscious Leadership | |
| Fusion | | | | | Fusion | CE CREDIT: Tax Cuts and Jobs Act (TCJA) for Business | | | Become an Area Developer | LUNCH | Become an Area Developer | | The Anatomy of a Credit Score | Preparing and Utilizing a Cashflow | Internal and External Financing | | Fusion |
| Momentum 1 | | | | | Momentum 1 | Dive into Phoenix: Features and Enhancements | | Dive into Phoenix: Features and Enhancements | | LUNCH | Dive into Phoenix: Features and Enhancements | | Dive into Phoenix: Features and Enhancements | | Dive into Phoenix: Features and Enhancements | | Momentum 1 |
| Momentum 2 | | | | | Momentum 2 | Learn How to Retain Customers and Earn Incentives with Financial Products in 2019! | Learn How to Retain Customers and Earn Incentives with Financial Products in 2019! | Auditing Your Office | Tax Content Process Discussion | LUNCH | Learn How to Retain Customers and Earn Incentives with Financial Products in 2019! | Learn How to Retain Customers and Earn Incentives with Financial Products in 2019! | Auditing Your Office | Tax Content Process Discussion | Vendor: Business Incorporation and Compliance with Corpnnet | | Momentum 2 |
| Momentum 3 | | | | | Momentum 3 | Introducing the NEW! Appointment/Scheduling Tool | Introducing the NEW! Appointment/Scheduling Tool | Tech Support Updates | ZeeNet Redesigned | LUNCH | Introducing the NEW! Appointment/Scheduling Tool | Introducing the NEW! Appointment/Scheduling Tool | Tech Support Updates | Tech Support Updates | | ZeeNet Redesigned | Momentum 3 |
| Imagination | | | | | Imagination | Franchisee Survey Results | Compliance Panel Discussion | Refundable Credits and Form 8867 | Do It For Me! | LUNCH | Refundable Credits and Form 8867 | Do It For Me! | The Million Dollar Mindset Panel | National Advisory Council (NAC) Panel | Blueprint for Growing a Multi-Unit Operation Panel | Franchisee Survey Results | Imagination |
| Adrenaline | | | | | Adrenaline | | | | | LUNCH | | | | | | | Adrenaline |
| xchg. 1 | | | | | xchg. 1 | Latino Tax Pro | Get Found Online! | Direct Mail | Market Maps | LUNCH | Latino Tax Pro (Elective) | Market Maps | Direct Mail | Get Found Online! | AdBuilder and Silvercrest | Emma | xchg. 1 |
| xchg. 2 (conference room only) | | | | | xchg. 2 (conference room only) | | | | | LUNCH | | | | | | | xchg. 2 (conference room only) |

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|-----------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-----------------------------------|---|---|---|---|-------|---|---|---|---|---|---|-----------------------------------|
| xchg. 3 | | | | | xchg. 3 | | | | | LUNCH | Closed Session | Closed Session | Closed Session | Closed Session | | | xchg. 3 |
| xchg. 4 (conference room only) | | | | | xchg. 4 (conference room only) | Hands on with Phoenix (Computer Lab) | Hands on with Phoenix (Computer Lab) | Hands on with Phoenix (Computer Lab) | Hands on with Phoenix (Computer Lab) | LUNCH | Hands on with Phoenix (Computer Lab) | Hands on with Phoenix (Computer Lab) | Hands on with Phoenix (Computer Lab) | Hands on with Phoenix (Computer Lab) | Hands on with Phoenix (Computer Lab) | Hands on with Phoenix (Computer Lab) | xchg. 4 (conference room only) |
| xchg. 5 | | | | | xchg. 5 | | | | | LUNCH | | | | | | | xchg. 5 |
| xchg. 6 (conference room only) | | | | | xchg. 6 (conference room only) | | | | | LUNCH | | | | | | | xchg. 6 (conference room only) |
| xchg. 7 | | | | | xchg. 7 | | | | | LUNCH | | | | | | | xchg. 7 |
| Salon A | High Level Marketing | High Level Marketing | High Level Marketing | High Level Marketing | Salon A | | | | | LUNCH | | | | | | | Salon A |
| Salon B | Operational Tax Season Readiness | Operational Tax Season Readiness | Operational Tax Season Readiness | Operational Tax Season Readiness | Salon B | | | | | LUNCH | | | | | | | Salon B |
| Salon C | Technology & Tools | Technology & Tools | Technology & Tools | Technology & Tools | Salon C | | | | | LUNCH | | | | | | | Salon C |

WEDNESDAY

| 9:00 - 9:40 | 9:50-10:30 | 10:40-11:20 | 11:30-12:10 | 12:20 - 1:20 | 1:30 - 2:10 | 2:20-2:50 | 3:00-3:30 |
|--|--|--|---|--------------|--|--|--------------------------------|
| Preparing Business Returns in Drake | | It Pays to Stay - Strategies for Preparer Retention (Panel and Overview) | | LUNCH | New Customer Acquisitions Panel | Preparing Business Returns in Drake | |
| Take the Next S.T.E.P. with our Star Tax Education Program! | | Winning Customers for Life! Panel (Customer Retention Strategies) | Winning the Second Half! Panel (Late Season Strategies) | LUNCH | Driving Single-Unit Success Panel (Strategies for Single-Unit Operators) | Take the Next S.T.E.P. with our Star Tax Education Program! | |
| Closing the Sale | | Steps to Build Your Performance Driven Marketing Plan | | LUNCH | Closing the Sale | | |
| Soci | | | | LUNCH | Soci | | |
| Identity Smarts | Identity Smarts | Identity Smarts | | LUNCH | CE CREDIT: Tax Cuts and Jobs Act (TCJA) for Individuals | | |
| One Team - One Goal | One Team - One Goal | One Team - One Goal | One Team - One Goal | LUNCH | One Team - One Goal | One Team - One Goal | One Team - One Goal |
| | | | | LUNCH | CE CREDIT: Tax Cuts and Jobs Act (TCJA) for Business | | |
| Dive into Phoenix: Features and Enhancements | | Dive into Phoenix: Features and Enhancements | | LUNCH | Dive into Phoenix: Features and Enhancements | | |
| Learn How to Retain Customers and Earn Incentives with Financial Products in 2019! | Learn How to Retain Customers and Earn Incentives with Financial Products in 2019! | Preparing and Utilizing a Cashflow | Internal and External Financing | LUNCH | Learn How to Retain Customers and Earn Incentives with Financial Products in 2019! | Learn How to Retain Customers and Earn Incentives with Financial Products in 2019! | Tax Content Process Discussion |
| Introducing the NEW! Appointment/ Scheduling Tool | Introducing the NEW! Appointment/ Scheduling Tool | Tech Support Updates | Tech Support Updates | LUNCH | Introducing the NEW! Appointment/ Scheduling Tool | Introducing the NEW! Appointment/ Scheduling Tool | ZeeNet Redesigned |
| Do It For Me! | The Million Dollar Mindset Panel | National Advisory Council (NAC) Panel | Blueprint for Growing a Multi-Unit Operation Panel | LUNCH | The Million Dollar Mindset Panel | National Advisory Council (NAC) Panel | Closing The Sale Panel |
| | Market Maps | AdBuilder and Silvercrest | Emma | LUNCH | AdBuilder and Silvercrest | Emma | |
| | | | | LUNCH | | | |
| | | | | LUNCH | | | |

