

# WMC

## SCHOOL

### MEETING AGENDA

#### Day 1: Overview of the America's Tax Solutions™ Program

9:00 AM	Video	9:45 AM	<b>The Wealth Management Consultant's (WMC) Role</b> <ul style="list-style-type: none"><li>• What is a Wealth Management Consultant?</li><li>• Why the WMC is so Important to the CPA</li><li>• Helping CPA Firms Build a Profitable Practice</li><li>• Working With the CPA's Clients</li><li>• Why CPAs Don't Trust You</li><li>• Why This Program Might Not Work For You</li><li>• The WMC Value Proposition</li><li>• Building a Wealth Management Practice</li><li>• Educating the CPAs on the Products</li><li>• Broker-Dealer Issues</li></ul>
9:15 AM	<b>The Retirement Time Bomb – Time to Defuse It</b> <ul style="list-style-type: none"><li>• The Perfect Storm of IRA Opportunity<ul style="list-style-type: none"><li>– How IRA and 401(k) Distributions Work</li></ul></li><li>• Three Things You Control</li><li>• Why 99% of CPAs and Advisors Don't Know This Stuff</li><li>• The Mistake That 87% of Your Clients Make</li><li>• Taxes are Going Up – Way Up!</li><li>• The Three Biggest Breaks in the IRC and How to Leverage Them</li><li>• How to Make the Most of This Program</li></ul>	10:00 AM	<b>Equipment Review</b> <ul style="list-style-type: none"><li>• ATS Equipment Standards for WMCs</li><li>• Recommendations</li></ul>
9:30 AM	<b>America's Tax Solutions™ Concept and Program Overview</b> <b>Barry Bulakites, President and CSO,</b> <i>Table Bay Financial Network, Inc.</i> <ul style="list-style-type: none"><li>• The America's Tax Solutions™ Concept and Value Proposition</li><li>• The Opportunity: The ATS Model</li><li>• America Counts on CPAs</li><li>• Why This Program is so Important</li><li>• Why This Program is the Ultimate Marketing Machine</li><li>• Cornerstones of the Program</li><li>• The Value Proposition for CPAs</li><li>• The Client Triangle</li></ul>	10:15 AM	<b>Managing the CPA Relationship</b> <ul style="list-style-type: none"><li>• How to Manage Their Emotions, Motivation and Concerns</li><li>• How to Control the Financial Expectations</li><li>• How to Keep Them Focused on the Goal</li><li>• How to Deal With Them During Tax Season</li><li>• Communication is the Key to Success With CPA Relationships</li></ul>
		10:45 AM	<b>Break</b>

CONTINUED ON PAGE 2

