



**June 29-30<sup>th</sup> , 2017**

**Thursday, June 29<sup>th</sup>**

9:00 AM

Welcome and Program Overview

*Barry L. Bulakites, Managing Partner Bay Financial Holdings. LLC*

9:30 AM

A New Day Dawns in Financial Services

- Past, Present, Future
- Undeniable Truths
- A Perfect Storm of Opportunity
- Creating a Pipeline of highly qualified prospects

10:00 AM

The CPA Direct Business Model

- CPA Direct – The Special Forces of America’s Tax Solutions™
- Our systematic process for generating strategic partnerships
- The 5 Strategic Shifts in Your Thinking
- ATS Foundational Fundamentals

10:45 AM

BREAK

11:00 AM

CPA Recruitment Process

*Deborah Naone, Director National Recruiting*

- ATS Recruiting Activities
  - Best Practice Tour Events
  - IRA Summit
  - CPA Symposiums
  - Advertising
  - Special Events
- Local Observation Recruiting
  - Your weekly obligations
- The Profile of the “Right” CPA Firm
- Attracting CPAs to America’s Tax Solutions™

- 11:30 AM The CPA Induction Process Roadmap  
*Priscilla Jones, Director Operations, America's Tax Solutions™*
- The CPA 90 Day Induction Process
  - Branding and Office Promotional Items
  - The Cake Program
- 12:15 PM LUNCH BREAK
- 1:30 PM Your First Meeting with The CPA
- Do's and Don'ts
  - The CPA Interview Guide
- 2:00 PM Opportunities Galore – The Opportunity Wheel
- 3:00 PM The ATS Tax Free Retirement System  
*Joseph Sulzinger, EVP Strategic Planning America's Tax Solutions*
- 5:30 PM Adjourn

**Friday, June 30<sup>th</sup>**

- 9:00 AM The America's Tax Solutions Sales System™
- The Wheel Protection Plan
  - The 4 Retirement Risk
  - The 5<sup>th</sup> Retirement Risk
  - The Retirement Roadmap
  - The 5-Step Plan
  - Two Little Phrases That Instantly Triple Your Closing Ratio
- 10:00 PM Certification and Maintaining Your Training Levels  
*Tiffany Fowler, Esq. Vice President and Chief Counsel*
- Your IRA Distribution Knowledge
    - The IRA Summit
    - The WPC School
  - Core Script Knowledge
    - The Opportunity Wheel
    - The ATS Wealth Protection Plan
    - The Two Obligations
    - The Gold Coins
    - Good v. Evil
  - On- Going Training and Improvement Plan
  - Becoming Contracted with Core Carriers
  - The RIA Opportunity

- 10:45 AM Promotional Pictures / Dress Up Please  
*Michael Gierka, Director Marketing Table Bay Financial*
- 11:00 AM Bay Wealth Management, LLC – Capturing all the money
- RIA Overview
  - Requirements
  - Platform Demonstration / Change Path  
*Cory Lagerstrom Esq. Principal Change Path*
- 12:00 PM Lunch Break
- 1:15 PM The Table Bay Advantage Partners Marketing Program  
*Barry L. Bulakites and Priscilla Jones*
- Filling the pipeline
  - Marketing with Facebook – The future is now!
  - Video Production to enhance your image
  - CPA and Advisor Websites
  - Effective Workshops
    - The Truth About FIAs – Baxter the Bear
    - Investing Today
    - Protecting Your Parents Money
    - Is YOUR IRA and IOU to The IRS
  - What's Working Now
- 2:00 PM The America's Tax Solutions™ Approved Product Line Up
- Annuity and Life Approved Products
  - One America
  - Barth Calderon Asset Protection Program
  - New Exciting Ways to Position Products
- 3:00 PM The Table Bay Training Programs
- Training Calendar and Training Brochure
  - Summer Educational Conference
  - Requirements
  - Webinar Training
- 3:30 PM Next Steps
- Your Agreement
  - Steps to take next
  - Getting productive
- 4:15 Adjourn