

The College Pre-Approval™ Experience

- 8:30 - 9:00:** Registration – Initiate Caffeine Launch Sequence
- 9:00 - 9:10:** Welcome Warm Up
- 9:10 – 10:00:** What Drives Us? – Why Planners Cannot Ignore College Planning Any Longer
- 15- Break:** Stretch Out and Refuel
- 10:15 - 12:00:** College Funding Strategies for Families "On the Bubble"
- 12:00 - 12:30:** A Glorious Lunch
- 12:30 - 1:30:** Fireside Chat with Joe Messinger and Heather Jarvis
(Moderated by a Very Special Guest)
- 15- Break:** High Fives and Hallway Chats
- 1:45 - 2:15:** College Pre-Approval™ in Action — A Client Case Study
- 2:15 - 2:45:** Making it Real – Hands-On Workshop with the College Pre-Approval™ System
- 2:45 - 3:00:** Making it Stick – College-Planning Opportunity Q&A with Joe
- 3:00 – 3:45:** Panel – Serving Your Clients and Your Practice with College Planning
- 15- Break:**
- 4:00 - 4:30:** Making it Happen – Our Best Marketing Ideas to 10X Your Investment

Dates: Monday, August 28th from 9:00 AM to 4:30 PM
Place: Fairmont Hotel Downtown, 717 N. Akard St., Dallas, TX 75201

For more information, contact David Bowman at
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