TAPER
THE BLUEPRINT FOR GROWTH

SAN ANTONIO AGENDA | OCTOBER 2026

TUESDAY, OCTOBER 20TH

	Track 1	Track 2	PWP Track
8:00 AM - 10:00 AM	Firm Intros & Keynote: Energizing Change: Empowering High-Performance Teams Through Uncertainty		
10:15 AM - 10:30 AM	Break		
10:30 AM - 11:30 AM	One Big Beautiful Bill Act: Key Components for Estate Planning and Elder Law	Hiring with Confidence: Building the Right Team from Day One	General Rules
11:30 AM - 1:00 PM	Lunch		
1:00 PM - 2:15 PM	Your First Trust Administration: A Practical Guide from Start to Finish	Beyond Job Descriptions: Building Accountability Through Role Clarity	Income & Assets
2:15 PM - 3:15 PM	Break		
2:30 PM - 3:45 PM	Strategizing Retirement Accounts Post-SECURE	Beyond the Synergy Meeting: Building Referral Relationships That Last	Exemptions and Spend-downs
3:45 PM - 4:00 PM	Break		
4:00 PM - 5:15 PM	Beyond Spend-Down: Advanced Medicaid Annuity Planning Strategies	The Scheduling Advantage: Creating an Exceptional Client Experience	Medicaid Software and Tools
5:15 PM - 6:15 PM	Cocktail Hour		

WEDNESDAY, OCTOBER 21ST

	Track 1	Track 2	PWP Track
8:00 AM - 8:50 AM	Attorney Roundtable: Real Conversations. Real Solutions.	Team Member Roundtable: Share Ideas. Solve Challenges. Strengthen Your Firm.	RMS Overview
8:50 AM - 9:00 AM	Break		
9:00 AM - 10:15 AM	The Ethics of AI: Understanding Your Professional Responsibilities	Kolbe & StrengthsFinder: Find Your Sweet Spot	Synergy Meeting
10:15 AM - 10:30 AM	Break		
10:30 AM - 11:30 AM	Beyond the LLC: Strategic Planning with the Single Purpose iPug®	Lead Generation That Converts: Building Marketing Campaigns That Drive Results	Social Styles
11:30 AM - 1:00 PM	Lunch		
1:00 PM - 2:15 PM	Mastering the TAP Trust: From Design Template to Drafting Confidence	AI Panel: Practical Strategies for the Modern Law Firm	Communication Skills
2:15 PM - 2:30 PM	Break		
2:30 PM - 3:45 PM	The Urgency Advantage: Why Elder Law Funnels Are Outperforming Traditional Estate Planning Marketing	Growing Your Firm: Knowing When, and How to Hire an Attorney	Calendar/Time Management
3:45 PM - 4:00 PM	Break		
4:00 PM - 5:15 PM	From Prospect to Lifelong Client: Improving Retention with the LWP Sales Process		Reporting & Data Entry
6:30 PM - 9:00 PM	Member Event		

THURSDAY, OCTOBER 22ND

	Track 1	Track 2	PWP Track
8:00 AM - 8:50 AM	NO SESSIONS		
9:00 AM - 10:15 AM	Exit Ready: Building a Law Firm Worth Leaving	Running a Modern, Efficient Law Firm: Systems Every Practice Must Have Regardless of Size/Software	All About the iPug
10:15 AM - 10:30 AM	Break		
10:30 AM - 11:30 AM	Funding Beyond Cash: Planning for Real Estate, Businesses & Other Illiquid Assets	The Probate Blueprint: Building a Consistent, Profitable Practice	EP Drafting 101
11:30 AM - 1:00 PM	Lunch		
1:00 PM - 5:15 PM	Annual Planning Retreat: Plan the Year. Win Every Quarter.		