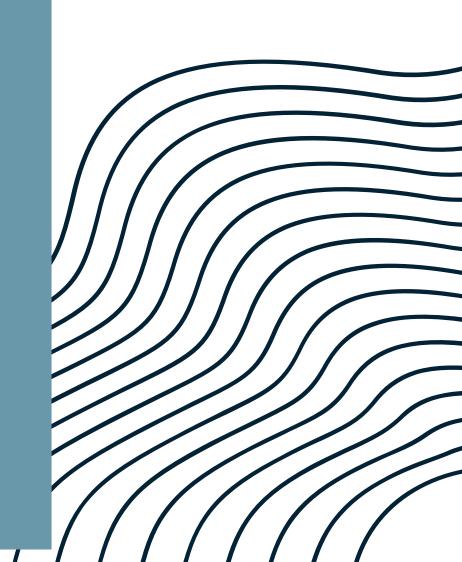


Please review carefully before registering. These requirements ensure you get the full value from your experience.

### Technology Requirements

- Laptop Required: Must bring a laptop (no tablets or phones) to populate your digital workbook.
- Microsoft Excel Installed: Ensure Microsoft Excel is fully installed and functional on your device. Currently the product isn't offered in google sheets for full functionality.
- Basic Excel Navigation Skills: You should be comfortable with basic Excel functions (e.g., entering data, using tabs, formulas).
- Internet Access & Navigation: Must be able to search online for details to populate your workbook during the session.
- External Mouse (Preferred): Speeds up navigation and enhances workbook usability.





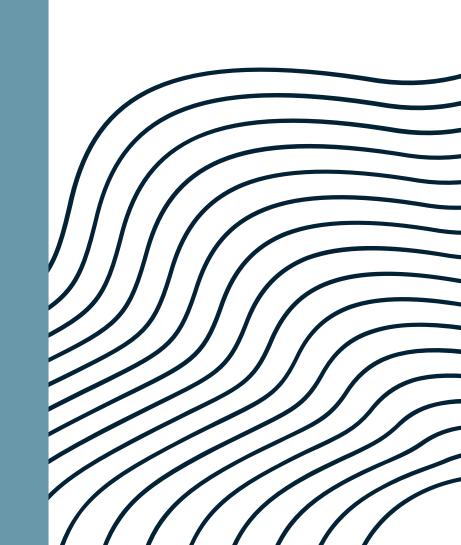
#### Attendance Checklist

Please review carefully before registering. These requirements ensure you get the full value from your experience.

#### **S** Attendance & Location

- In-Person Attendance Only: Workshops are not available virtually. You must attend in person.
- **DMV Area Requirement:** Workshops are held in Washington, D.C., Maryland, and Virginia. You must be local or able to travel.
- Workshops in Other States: We partner with law firms nationwide. Check our <u>upcoming events</u> or contact us to request a workshop in your area.





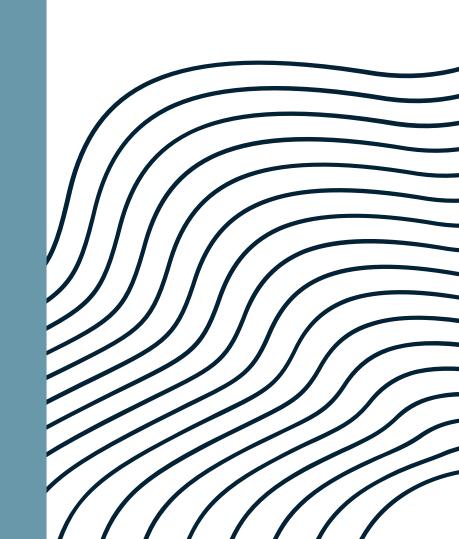


Please review carefully before registering. These requirements ensure you get the full value from your experience.

### Workshop Experience

- Pre-Workshop Assignment: Upon registration, you'll receive a "homework assignment" to begin populating your digital workbook. This ensures you arrive prepared and ready to engage.
- Take-Home Materials: Leave with a clear, personalized digital workbook and reference materials to continue refining your plan.
- Hands-On Coaching: Expect guided support, real-time feedback, and actionable insights tailored to your goals.





#### Attendance Checklist

Please review carefully before registering. These requirements ensure you get the full value from your experience.

#### **Additional Notes**

- Arrive Early: Doors open 15 minutes before the start time for setup and tech check.
- **Bring Relevant Documents:** If possible, bring key financial or estate documents to reference during workbook completion.
- **Support Available:** Our team will be on-site to assist with technical issues or workbook questions.



