

UMT Coaching Workshop

✓ Attendance Checklist

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.



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📍 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 [upcoming events](#) or contact us to request a workshop in your area.



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📖 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.



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📌 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.



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