



2019 AADMM Call for Presentations Worksheet

Suggested Topics

The planning committee is open to a wide array of topics to be included in the annual conference program. However, our members have indicated a few specific topics they would like to see covered:

- Advanced sessions on topics such as bookkeeping, budgeting, technology tools, Medicare, etc.
- Working with/identifying/understanding clients with dementia
- Online security
- Working remotely with clients

In general, our members want to learn the “how to.” Focus should be on practical, actionable steps and information. Sessions can be directed at DMMs of all levels, serving different client bases, or specific to one level or client type.

When considering your topic, keep in mind we give priority to CEU-qualified sessions. These sessions provide knowledge directly related to the daily money management work we do for our clients. The presentation description should explain how the topic correlates to increased knowledge in the types of DMM services we are providing to clients. For a full list of recertification content topics, [click here](#).



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The following questions must be answered on the online Call for Presentations. This document will help you prepare your answers so that you can complete the online form with ease. Applications are **ONLY** accepted using this link:

<https://www.surveymonkey.com/r/2019AADMMPresentations>

Conference Location & Dates: Savannah, GA | Nov. 15-17, 2019

Theme: "Be Prepared."

Presentation Submissions Due: Monday, February 18, 2019

- Handout files are **REQUIRED** and due: October 1, 2019
- Final presentation slides due (if different from handouts): October 25, 2019

1. Presentation Information

Title (10 word maximum):

Submitted by:

Date:

2. Session description: (40-word limit)

3. Session Type desired:

Pre-Conference (3 hr) General Session/Breakout (1 hr)

4. List overall goals and objectives of the session.

5. What level of expertise will the presentation target?

Basic

Intermediate

Advanced

General

6. What DMM specialization area will your presentation target? (Pick one)

Personal Finance

Seniors

Busy Professionals

Small Business

All

Other (with fill-in box)

Deadline February 18, 2019

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7. What format will you use for your presentation? (Note: Panels cannot contain more than 3 people. The panel facilitator/moderator is responsible for pulling together the session and can also be a presenter on the panel.)

Individual presenter Panel (must list each panel member separately below)

8. What will your presentation include? (Choose as many as apply)

Lecture Discussion Case Study Interactive

9. List audio/visual needs. (Note: AADMM will make available an LCD projector, computer and screen. Presentations must be provided 1 week before Conference via email and on PC-compatible USB drive as a backup at Conference.)

10. Speaker information: (If panel, provide information for each panelist)

Name & Designations

Title & Company:

Address:

City:

State:

Zip:

Email:

Phone:

I am a member of AADMM: Yes No

Daily Money Manager since:

0-3 years

4-7 years

7-10 years

10 years +

N/A

Online presence:

Twitter handle:

Facebook page URL:

LinkedIn page:

Website:

Blog:

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Bio (50 words or less):

What additional resources related to you and your topic should attendees know about (books, articles, web links, etc.) – 75 words or less

List prior speaking engagements:

How did you hear about AADMM?