



# BUSINESS *ACCELERATOR*

**You've Built a Business, Now it's Time to *GROW!***  
**Get the Tools You need to Expand Your Business**

**June 22 - 23, 2019**  
**Hilton Alexandria Old Town | Alexandria, Virginia**

As part of AADMM's ongoing commitment to meeting the needs of our members, we are thrilled to announce our newest program. The Business Accelerator will offer in-depth training to a select group of AADMM members.

Participants will learn tools to:

- Market their businesses and talk about daily money management
- Work with clients, including contracts, documentation, fee, structure, and more
- Manage operations, including budgeting and forecasting, staffing, and risk management
- Maintain professionalism, by adhering to AADMM's Standards of Practice, Code of Ethics, and by maintaining certification
- And much more.

## How to Participate

This opportunity will only be offered to a small group of participants; a brief application will be required to ensure that the program is offered to the people who will benefit most.

Step 1: [Apply to attend](#). Answer a few brief questions about your business.

Step 2: If you are selected to attend, you will receive a link to register and pay.

Step 3: Make your travel and hotel arrangements.

Step 4: You will receive some "homework" to be completed before the program. This is a self-assessment that must be completed in order to fully participate and get the most out of your experience.

[www.aadmm.com](http://www.aadmm.com)



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## Schedule of Events

**Saturday, June 22**

- 8:00 am – 8:45 am**    **Breakfast and Program Kick-Off**  
Meet your facilitators and your fellow participants, discuss what was learned from your self-assessment homework and set your personal goals for the course
- 8:45 am – 9:45 am**    **Marketing**  
Are people confused when you tell them what you do? You will learn tips to define and discuss daily money management, preparing you to approach potential clients with confidence.
- 9:45 am – 10:00 am**    **Break**
- 10:00 am – 12:00 pm**    **Networking Topics**  
Have you wondered why some people get great results from their networking activities? You too can make networking work for you. We will introduce best practices around topics such as defining your networking goals, targets, messages and forums. You will learn tips and tricks from seasoned networkers and practice during group role play sessions.
- 12:00 pm – 1:00 pm**    **Lunch**  
During lunch, we will discuss our own niche markets, and network with those who share them.
- 1:00 pm – 3:00 pm**    **Working with Clients**  
This session will discuss specifics of client interactions, including: initial contact, detailing the scope of services, contracts, fee structure, documentation, and disengaging.
- 3:00 pm – 3:15 pm**    **Break**
- 3:15 pm – 5:30 pm**    **Business Operations**  
Launching a new business is often easier than managing a business. This session will focus on business operations, including: budgeting, cash flow and forecasting, staffing, virtual work options, and risk management. In addition, security/encryption as well as physical security, will be discussed.
- 5:30 pm**    **Group Networking Dinner (price not included in registration fee)**  
Join your fellow participants and facilitators for small-group dinners at restaurants near the hotel. Discuss what you learned, and trade stories about lessons learned in daily money management.



## Sunday, June 23

**8:00 am – 8:30 am** Breakfast and Day One Review

**8:30 am – 10:30 am** Time Management

One of the toughest things as you grow your business is to make sure you spend enough time working “on” your business and not just “in” your business. We will cover boundary setting, managing your administrative time and the importance of avoiding the “feast or famine” cycle.

**10:30 am – 11:00 am** Professionalism

Learn how to rise above your competitors by exemplifying and promoting professionalism. From following the Standards of Practice and Code of Ethics to maintaining confidentiality, your clients will notice. In addition, PDMM certification will be discussed as another way to set yourself apart from others.

**11:00 am – 11:15 am** Break

**11:15 am – 12:30 pm** Accountability Partners

What is an accountability partner, how can you be one, and how can one help you stay on track?

**12:30 pm – 1:30 pm** Review, Set Goals, and Determine Next Steps!

## Accommodations



**Hilton Alexandria Old Town**  
**1767 King Street, Alexandria, Virginia**  
[Hotel Website](#)

For reservations, visit the [Reservation Website](#)  
or

call the hotel’s reservations line at 703-647-2014 and  
provide group code JAQ

You must identify yourself as part of the AADMM Business Accelerator to obtain the group rate. It is important that you indicate any special rooming needs or arrangements at the time of this call.

**Group Room Rate (single/double): \$155.00, plus taxes.**

AADMM cannot guarantee room availability. The discounted group rate concludes on **Thursday, May 30**. Rooms will be available at the discounted rate until that date, or until the block is filled, whichever comes first. Requests for reservations after May 30 will be accepted by the hotel on a space and rate availability basis. For those making reservations prior to the deadline, rooms may also be available at the group rate on the three days prior to and the three days after the actual conference to accommodate vacation planning.

Please review the hotel’s [website](#) for driving or Metro directions, and information about parking.

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## About the Facilitators



### **Sheri Samotin, PDMM, NCG**

Sheri is a California Licensed Professional Fiduciary (license #801), certified Professional Daily Money Manager and National Certified Guardian. She formed LifeBridge Solutions after watching friends and family struggle with the day-to-day business of life.

She brings more than 35 years of business and management experience to this program. She was a managing director at The Wilkerson Group, a division of IBM Healthcare Consulting. Subsequently, Sheri managed a surgical practice, where that she honed her skills as a keen negotiator, providing medical claims advocacy services on behalf of the practice and the patients. Immediately prior to founding LifeBridge Solutions in 2009, Sheri served as the COO for a national management consulting firm, where she oversaw all day-to-day operations and coaching the firm's executives.

In addition to her certifications, Sheri is a graduate of Wesleyan University in Connecticut with a degree in economics and hold a master of business administration (MBA) from the Amos Tuck School of Business at Dartmouth College in Hanover, New Hampshire.



### **Rebecca Eddy, MBA, PDMM®**

Rebecca is a founding partner of Eddy & Schein In-Home Administrators for Seniors®. She has worked since 1990 with seniors and very high net worth busy professionals, managing their personal, financial, legal, and insurance matters, and co-

ordinating their relationships with their trusted advisors. The company serves the New York City tri-state area and Los Angeles, CA.

Rebecca has an MBA from Yale School of Management, and was in the first class of PDMMs. She was the founding president of the AADMM-Greater NY Chapter, and has been an instructor for both the Business Basics Workshop and webinar sessions, as well as presenting at conferences.

Rebecca and her business partner, Gideon Schein, have tried many approaches to marketing their business since incorporating in 2000, including hiring consultants to assist them. They are constantly developing ways to better inform the public about the services of daily money managers in general, and their company in particular.

## Fees and Options

AADMM is pleased to offer a savings of 20% for this first-time offering. The fee to attend the program is \$600.00. Note that the fee will increase to \$750 in future years. The fee includes the two-day program and materials, two breakfasts, two lunches, and breaks.

Participants may also opt to invest in an ongoing program with their peers and facilitators. This extended program, available for \$200.00, allows participants to meet via six interactive phone calls to discuss ongoing issues, and the application of tools learned in the program.

## Apply to attend

Space for this exclusive event is limited. If you think this program can benefit the growth of your business, [apply](#) by answering a few brief questions. If your application is accepted, we will send you registration information and the homework necessary to make the most of this opportunity.