

# The Practitioner's Advisory Summit

June 14, 2023

(All times are EST)

- 10:30 – 11:00      **Registration and Sign In**
- 11:00 – 11:05      **Welcome Remarks – Eric Green**
- 11:05 – 11:50      **What are “Tax Advisory” and “Business Advisory” services?**
- Moderator:      Eric L. Green, Esq., Tax Rep Network
- Panelists:      Diana A. Crawford, CPA, Crawford, Merritt & Company  
                         Al-Nesha Jones, CPA, MBA, ASE Group  
                         Dawn W. Brolin, CPA, CFE, MST, Powerful Accounting LLC
- 11:50 – 12:20      **Worst Tax Season EVER: Maintaining Your Mental Health**
- Panelists:      Dawn W. Brolin, CPA, CFE, MST, Powerful Accounting LLC  
                         Randy Crabtree, CPA, Tri Merit
- 12:20 – 1:30      **Leveraging Technology: The Tech Tools to Use**
- Panelists:      Dawn W. Brolin, CPA, CFE, MST, Powerful Accounting LLC  
                         Eric L. Green, Esq., Tax Rep Network
- 1:30 – 2:00      **Lunch Break**
- 2:00 – 2:45      **Action Steps: Where to Begin**
- Panelists:      Eric L. Green, Esq., Tax Rep Network  
                         Dawn W. Brolin, CPA, CFE, MST, Powerful Accounting LLC
- 2:45 - 3:00      **Coffee Break**
- 3:00 – 3:45      **Pricing: How to go from hourly/product billing to “relationship pricing”**
- Moderator:      Dawn W. Brolin, CPA, CFE, MST, Powerful Accounting LLC
- Panelists:      Diana A. Crawford, CPA, Crawford, Merritt & Company  
                         Al-Nesha Jones, CPA, MBA, ASE Group
- 3:45 – 4:30      **Converting Existing Clients and Attracting New Clients**
- Panelists:      Eric L. Green, Esq., Tax Rep Network  
                         Gaynor Meilke, Charisma Ink