



NonprofitCPAs

SUMMER MEETING PLANNER 2024 AGENDA & LOGISTICS

Meeting Host:

Alliant Group
3009 Post Oak Blvd.
Houston, TX 77056

Meeting Contact:

Robin Brothers:
615-594-2715
robin@therainmakercompanies.com

DESTINATION: HOUSTON, TX

MEETING HOST: ALLIANT GROUP

DATES: JUNE 12 & 13, 2024

ACCOMODATIONS:
ROYAL SONESTA HOUSTON GALLERIA

JUNE 11, 2024	NETWORKING RECEPTION 5:00 PM - 6:30 PM @ ALLIANT GROUP
JUNE 11, 2024	COMMUNITY DINNER 7:00 PM @ RESTAURANT- TBD
JUNE 12, 2024	MEETING AT ALLIANT GROUP
JUNE 12, 2024	COMMUNITY DINNER 7:00 PM @ RESTAURANT- TBD
JUNE 13, 2024	MEETING AT ALLIANT GROUP

DAY 01 — 8:00 AM - 5:00 PM

- 8:00 AM - Breakfast
- 9:00 AM - Welcome, Introductions, AI Workshop, *Chris Stephenson, Alliant Group*
- 10:15 AM - Break
- 10:30 AM - Continue AI Workshop
- 12:00 PM - Lunch
- 1:00 PM - Best Practice Workshop, Client Segmentation, *Carrie Steffen, The Whetstone Group*
- 5:00 PM - Networking Reception
- 7:00 PM - Community Dinner

DAY 02 — 8:00 AM - 12:00 PM

- 8:00 AM Breakfast
- 9:00 AM - Roundtable Discussions, *Angie Grissom, The Rainmaker Companies*
- 12:00 - Meeting adjourns, depart for Airport