



MAY 5-6, 2025

# RECHARGE

Conference



**COLLECTIVE**  
— BY DBA —

# SET YOUR INTENTION

We're so glad you're here at RECHARGE. Take a moment to capture why you're here, what you hope to gain, and what is needed most in your firm. A written goal has a greater chance of getting accomplished, and you can refer to this page over the next few days.

## AGENDA

(Central time zone)

### Monday, May 5, 2025

8:00 - 9:00 AM	Breakfast and Registration	Iris Room
9:00 - 9:30 AM	Welcome	Iris Room
9:30 - 11:00 AM	Firm KPIs and Tax Season	Iris Room
11:00 - 12:30 PM	Mergers and Acquisitions	Iris Room
12:30 - 1:30 PM	Lunch	Iris Room
1:30 - 3:00 PM	Automation and AI	Iris Room
3:00 - 3:45 PM	Ask an expert: Technology and Security	Iris Room
3:45 - 4:30 PM	Table Talk: Prioritizing your next 6 months	Iris Room
6:30 - 8:30 PM	Dinner: Cinco De Mayo Fiesta	Cyclone Anaya's

# AGENDA

(Central time zone)

## Tuesday, May 6, 2025

8:00 - 9:00 AM	Breakfast and Registration	Iris Room
9:00 - 9:15 AM	Welcome	Iris Room
9:15 - 11:00 AM	Marketing Your Firm	Iris Room
11:00 - 12:00 PM	Team of 3 Updates	Iris Room
12:00 - 1:00 PM	Lunch	Iris Room
1:00 - 2:00 PM	Staff Development and Training	Iris Room
2:00 - 3:30 PM	Recruiting, Hiring, and Offshoring	Iris Room
3:30 - 4:00 PM	Closing Remarks	Iris Room
4:00 - 5:00 PM	Farewell Reception	Bar Louie

## Bonus Day, May 7, 2025

8:00 - 9:00 AM	Breakfast and Registration	Iris Room
9:00 - 9:15 AM	Welcome	Iris Room
9:15 - 10:15 AM	Drilling into MRR	Iris Room
10:15 - 11:30 AM	Tax Planning - Selling and Delivering	Iris Room
11:30 - 12:15 PM	Firm Achievement Spotlight	Iris Room
12:15 - 1:00 PM	Lunch	Iris Room

# DAY 1 NOTES

# WELCOME TO RECHARGE

## Marcus Dillon

Notes:

[illegible]

Key takeaway:

# DAY 1 NOTES

## FIRM KPIS AND TAX SEASON

**Amy McCarty, Marcus Dillon, and Ben Gabriel**

Notes:

This image shows a full page of blank handwriting practice paper. It features multiple sets of horizontal lines. Each set typically consists of three lines: two outer blue lines defining the height of capital letters and a middle red line for lowercase letters. There are approximately 10 such sets of lines across the page, providing ample space for practicing letter formation and alignment. The background is white, and the lines are evenly spaced and extend across the entire width of the page.

Key takeaway:

# DAY 1 NOTES

## MERGERS AND ACQUISITIONS

## Marcus Dillon

Notes:

This image shows a full page of blank, white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for handwriting practice or general note-taking. There are no margins, text, or other markings on the page.

Key takeaway:

# DAY 1 NOTES

## AUTOMATION AND AI

## Amy McCarty

Notes:

[illegible]

Key takeaway:

# DAY 1 NOTES

## ASK AN EXPERT: TECHNOLOGY AND SECURITY

## Angel Sabino

Notes:

[illegible]

Key takeaway:



# DAY 1 NOTES

## TABLE TALK: PRIORITIZING YOUR NEXT 6 MONTHS

## Ben Gabriel

Notes:

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

Key takeaway:

## DAY 2 NOTES

## MARKETING YOUR FIRM

## Rachel Dillon

Notes:

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Key takeaway:

# DAY 2 NOTES

## TEAM OF 3 UPDATES

## Amy McCarty and Lezlie Reeves

Notes:

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Key takeaway:

# DAY 2 NOTES

## STAFF DEVELOPMENT AND TEAM TRAINING

## Amy McCarty and Lezlie Reeves

Notes:

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Key takeaway:

# DAY 2 NOTES

## RECRUITING, HIRING, AND OFFSHORING

## Christine Nietzke

Notes:

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Key takeaway:

## ADDITIONAL NOTES

## ADDITIONAL NOTES AND ACTION ITEMS

Notes:

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## BONUS DAY NOTES

## DRILLING INTO MRR

## Ben Gabriel

Notes:

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Key takeaway:

## BONUS DAY NOTES

## TAX PLANNING - SELLING AND DELIVERING

## Marcus Dillon and Ben Gabriel

Notes:

[illegible]

Key takeaway:



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