



## CAROLINAS WINTER 2019 MEETING – TAM & EPIC

Date: Friday, December 13, 2019

Location: Hotel Indigo (Room rate: \$149 per night)  
 250 Johnnie Dodds Boulevard, Mount Pleasant, SC 29464  
 843-884-6000

Group Name: Applied Client Network Carolinas Chapter

**Registration Deadline – Friday, 12/6/19 – 5:00 PM**

**Room Block Released 11/26/19**

### Concurrent Sessions – TAM – EPIC

#### Agenda

|  |  |                          |                       |                                 |                  |  |               |
|--|--|--------------------------|-----------------------|---------------------------------|------------------|--|---------------|
| 8:30 – 9:00  | Business Meeting, New Board, 2020 Planning Topics  |                          |                       |                                 |                  |  |               |
|  | <b>Concurrent Sessions</b>   |                          |                       |                                 |                  |  |               |
| 9:00 – 10:15<br>10:15 – 10:30 Break<br>10:30 – 11:45 | <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; text-align: center;"><b>EPIC – Palmetto I</b></td> <td style="width: 50%; text-align: center;"><b>TAM - Magnolia</b></td> </tr> <tr> <td style="text-align: center;"><i>Foundations of Reporting</i></td> <td style="text-align: center;">Document Merging</td> </tr> <tr> <td style="text-align: center;">Accounting Fields<br/>for Non Accountants</td> <td style="text-align: center;">Tips &amp; Tricks</td> </tr> </table> | <b>EPIC – Palmetto I</b> | <b>TAM - Magnolia</b> | <i>Foundations of Reporting</i> | Document Merging | Accounting Fields<br>for Non Accountants | Tips & Tricks |
| <b>EPIC – Palmetto I</b>                             | <b>TAM - Magnolia</b>  |                          |                       |                                 |                  |  |               |
| <i>Foundations of Reporting</i>                      | Document Merging   |                          |                       |                                 |                  |  |               |
| Accounting Fields<br>for Non Accountants             | Tips & Tricks  |                          |                       |                                 |                  |  |               |
| 12:00 – 1:00   | Lunch  |                          |                       |                                 |                  |  |               |
|  | <b>Joint Session – Palmetto 1</b>  |                          |                       |                                 |                  |  |               |
| 1:00 – 2:30<br>2:30 – Adjournment                    | <b>Why Should We Consider EPIC</b><br><b>General Q&amp;A – EPIC &amp; TAM</b>  |                          |                       |                                 |                  |  |               |

**President**  
 Steve Booth, AAM  
 Dominick Huckabee  
 Noblin & Trent  
 3604 Shannon Rd., Ste.  
 105  
 Durham, NC 27707  
 (919) 286-7473  
 steve@dhntinsurance.com

**Past President**  
 Debra Hoffman, CIC, CPIW  
 Retired

**Secretary**  
 Need Volunteer for position

**Treasurer**  
 Rick Davis  
 LMWS Insurance  
 1320 Commerce Drive  
 New Bern, NC 28562  
 (252) 637-4173, Ext, 238  
 RDavis@ticnc.com

**Education Committee**  
 Need Volunteer for position

**Meeting Facilitator**  
 Joyce R. Kronenwetter  
 (704) 236-2605  
 jrkronenwetter@gmail.com

**EPIC Presenter Bio:**

- Lauren Tripp, Consultant, Kite Technologies. With deep experience in administration, accounting and support functions in TAM, she played an integral role her agency's move from TAM to EPIC. Today, she assists agencies to develop EPIC workflows, audit workflows and procedures including both implementation and optimization.

**TAM Presenter Bio:**

- Steve Booth, AAM, Producer/IT/Accounting, Dominick Huckabee Noblin & Trent; Master Presenter for Applied.

**Registration Fee:**

Chapter Member – \$50                      Non-Member – \$75

*Breakfast included in Room Rate*  
*Registration includes Plated Lunch*

*NOTE: For planning purposes, please Register ASAP.*  
*Fee will be returned if cancellation requested by 5PM, Friday, December 6.*

**“Users Helping Users”**

**NOTE: 2 DRAWINGS FOR APPLIED NET (TENCON) REGISTRATION**

**1 per agency**

✂ **Detach and mail for each registration:**

Pay by Mail: ACN Carolinas Users Group  
c/o Joyce R Kronenwetter  
113 Ft. William Avenue, Belmont, NC 28012

**Please note special dietary needs beside name.  
Make checks payable to ACN Carolinas Users Group**

Agency represented: \_\_\_\_\_ EPIC? TAM?

: \_\_\_\_\_ email: \_\_\_\_\_