



Host Hotel: Hyatt Centric The Loop Chicago  
100 West Monroe Street  
Chicago, IL 60603  
312-236-1234

## *Proposed Agenda*

### **Wednesday, September 23rd**

|                 |   |               |
|-----------------|---|---------------|
| 1:00pm          | Welcome   |               |
| 1:10pm - 2:10pm | Update from Board and Q&A   | Board         |
| 2:10pm - 3:00pm | Using OI Solutions to drive business  | Claudia       |
| 3:00pm - 3:15pm | Break   |               |
| 3:15pm - 4:15pm | ECareer Center Training   | Tom & Claudia |
| 4:15pm - 5:00pm | How can OI add value to the partners. What other services can be provided?<br>How can OI add to firms purchasing power? | Board         |
| 5:00pm - 6:30pm | Reception with heavy hors d'oeuvres and drinks  |               |

### **Thursday, September 24<sup>th</sup>**

|                   |   |                    |
|-------------------|---|--------------------|
| 7:00am - 8:00am   | Breakfast   |                    |
| 8:00am - 9:00am   | Lincolnshire update and discussion  | Susan /Jim         |
| 9:00am - 10:00am  | Speaker: Succession Planning<br>Setting your business up for value                            | TBD                |
| 10:00am - 10:15am | Break   |                    |
| 10:15am - 11:15am | Discussion of firms who are planning on transition in the next few years.<br>How can we help? | Susan/Jim/Board    |
| 11:15am - 12:00pm | Chris Medici Update   | Chris Medici & Tom |
| 12:00pm - 1:00pm  | Lunch   |                    |
| 1:00pm - 2:00pm   | What services are firms offering other than outplacement?                                     |                    |
| 2:00pm - 3:00pm   | Partner Success Stories   |                    |
| 3:00pm            | Meeting Adjourned   |                    |