

Training Location & Hotel Information

REGIONAL TRAINING SESSIONS

New York, NY

Thursday, 09/27/07 8:00 am - 5:00 pm

Friday, 09/28/07 8:00 am - 12:00 pm (Enterprise Only)

THE WESTIN NEW YORK AT TIMES SQUARE

270 WEST 43RD STREET

NEW YORK, NY 10036

RESERVATIONS: 866-837-4183

Chicago, IL

Friday, 10/05/07 8:00 am - 5:00 pm

THE HOTEL MONACO CHICAGO

225 NORTH WABASH

CHICAGO, IL 60601

RESERVATIONS: 866-610-0081

Atlanta, GA

Friday, 10/12/07 8:00 am - 5:00 pm

DOUBLETREE HOTEL ATLANTA - BUCKHEAD

3342 PEACHTREE ROAD NE

ATLANTA, GA 30326

RESERVATIONS: 404-231-1234

Hartford, CT

Thursday, 10/25/07 8:00 am - 5:00 pm

Friday, 10/26/07 8:00 am - 12:00 pm (Enterprise Only)

HARTFORD MARRIOTT DOWNTOWN

200 COLUMBUS BLVD

HARTFORD, CT 06103

RESERVATIONS: 860-249-8000

Reno, NV

Monday, 11/12/2007 8:00 am - 5:00 pm

ELDORADO HOTEL & CASINO

345 NORTH VIRGINIA ST

RENO, NV 89501

RESERVATIONS: 775-348-9271

DALLAS HANDS-ON CLASSES (1-1/2 DAYS)

Dallas, TX (1)

Monday, 09/10/07 8:00 am - 5:30 pm

Tuesday, 09/11/2007 8:00 am - 12:00 pm

Dallas, TX (2)

Monday, 09/17/07 8:00 am - 5:30 pm

Tuesday, 09/18/07 8:00 am - 12:00 pm

Dallas, TX (3) Enterprise Only Class

Monday, 10/15/07 8:00 am - 5:30 pm

Tuesday, 10/16/07 8:00 am - 12:00 pm

LOCATION:

TRITECH SOFTWARE DEVELOPMENT CORP.

740 E CAMPBELL RD, SUITE 400

RICHARDSON, TX 75081

SUGGESTED HOTEL:

THE RICHARDSON HOTEL

701 E CAMPBELL RD

RICHARDSON, TX 75081

RESERVATIONS: 972-231-9600

Dallas Training Agenda (Enterprise)



DAY ONE



Continental Breakfast (8:00am – 8:30am)

Introductions (8:30am – 8:45am)

Session 1 (8:45am – 9:30am)

Overview of Enterprise Platform

In this opening session, we will discuss the basic interface of the Enterprise platform as well as the installation and update process.

Session 2 (9:30am – 10:00am)

Data Entry & Import Functionality

This session covers the different types of data entry. This session will also focus on the Import feature of Premium Pro. You will learn how to import information into the State Business Page, Schedule T, and states containing municipal information.



Break (10:00am – 10:15am)

Session3 (10:15am – 11:00am)

Company Information

In this session, you will become familiar with the Annual Statement area and we will review the key entry locations for Guaranty Fund Assessments, Prepayments, and Qualified Premiums.

Session 4 (11:00am – 12:00pm)

State Filing Returns

We will take an in depth look at how your Annual Statement data transfers to your state of filing returns. We will also cover the State Filing Information Page, Return Instructions, and Preparer Notes, all of which will aid you when filing your returns. Additionally, we will discuss how to activate, deactivate and lock returns.



Lunch (12:00pm – 1:00pm)

Session 5 (1:00pm – 2:00pm)

Retaliatory Calculations

This session traces figures entered in the Company Information area to the state of domicile sections of your returns. We will discuss the retaliatory calculations of your state returns, which includes the Retaliatory Input Schedule, the use of retaliatory worksheets, and your state of domicile's foreign return. We will review the manner in which Premium Pro Enterprise calculates retaliatory taxes and fees.

Session 6 (2:00pm – 3:00pm)

Management Reports, Summary Schedules, Check Requests

We will review how to verify the amounts of premium taxes and fees calculated for a given state by using the Summary of Taxes Schedule. This is an ideal report for management to analyze taxes and fees. Next, you will take a closer look at the layout of your check requests and check request summary. You will also learn how to export this information into your accounts payable system.



Break (3:00pm – 3:15pm)

Session 7 (3:15pm- 4:00pm)

Estimates Taxes

We will cover the estimate module of Premium Pro. We will go over the Estimate Input schedule, transfer of data from the Annual returns, and we will also show you how the Summary Schedules differ from the Annual module.

Session 8 (4:00pm- 4:30pm)

Print

This session is designed to cover the printing process of the Premium Pro Enterprise software for both the Annual and Estimate Module. Some of the important topics are the Print Dialog, Print options, Print by Page feature, and Print to PDF capabilities.

Session 9 (4:30pm- 5:00pm)

Open discussion



DAY TWO



Continental Breakfast (8:00am – 8:30am)

Introduction to other products (8:30am – 9:00am)

Session 10 (9:00am – 9:45am)

Miscellaneous Premium Forms Package

This session will provide you with an overview of the Miscellaneous Premium Forms Package. You will learn how this software package can help simplify the overwhelming task of locating and completing additional Premium Tax forms.



Break (9:45am – 10:00am)

Session 11 (10:00am – 11:30am)

Premium Pro Enterprise Municipal

This session will walk you through the Municipal Enterprise software from creating a file to printing returns. You will learn how to add/delete municipalities, import ASCII files, cut and paste data, calculate, review and print returns. Different schedules will also be discussed to give you a broader view of the software.

Session 12 (11:30am- 12:00pm)

Open discussion