

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 (Desktop)



DAY ONE



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

Introductions (8:30am – 8:45am)

Session 1 (8:45am – 9:45am)

Creating Data Files & Importing Data

This session covers various useful topics from creating data files to the different types of data entry. Files containing prior year data will be created to demonstrate the capabilities of the rollover utility. 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.

Session 2 (9:45am – 10:30am)

Option, Rate and Fee Tables and Calculation Methods

By altering various global and state specific options, you will learn about the flexibility of the calculation process and you will find out how you can customize the software to best suit your specific company needs. We will also discuss the Rate and Fee Tables, where you may view and modify any tax rate and/or fee that a state may levy against your company. This session will end with a discussion of the different types of calculation methods.



Break (10:30am – 10:45am)

Session 3 (10:45am – 12:00pm)

Flow of Data from the Annual Statement to Current State Returns

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



Lunch (12:00pm – 1:00pm)

Session 4 (1:00pm – 2:00pm)

Retaliatory Calculations

This session traces figures entered in the Annual Statement 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 worksheets in place of your state of domicile's return, and the manner in which Premium Pro calculates retaliatory taxes and fees.

Session 5 (2:00pm – 2:45pm)

Summary Schedules and Export of 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 (2:45pm – 3:00pm)

Session 6 (3:00pm- 3:30pm)

Estimates Taxes and Print

In the first part of this session, the estimate module of Premium Pro will be covered. We will cover how to get your numbers and general information pulled over from the Annual returns. We will also show you how the Summary Schedules differ from the Annual module. The second part of this session is designed to cover the printing process of the Premium Pro software for both the Annual and Estimate Module. Some of the important topics are the Print Dialog, Print options, and Print by Page feature.

Session 7 (3:30pm – 4:00pm)

GFA Tracking System

This session will introduce you to the Guaranty Fund Assessment Tracking System that has been designed to keep a detailed record of your Guaranty Fund Assessments and Credits. You will learn how this extensive system keeps track of your GFA information, how the check request and summary schedules are generated, and how to print the various spreadsheets available in this module.

Session 8 (4:00pm – 5:00pm)

Premium Pro Enterprise Life/PC

This session will provide you with a demonstration of the new platform for the upcoming year.



DAY TWO

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



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

Session 9 (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 10 (10:00am – 11:30am)

Municipal

This session will walk you through the Municipal 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 11 (11:30am – 12:00pm)

Premium Pro Enterprise Municipal

This session will provide you with a demonstration of the new platform for the upcoming year.