

EA

ENROLLED AGENT EXAM INSTITUTE™

SPEAKER PROSPECTUS



EA MASTERY RETREAT AT CHATEAU ÉLAN



SPEAKER PROSPECTUS

Overview of Opportunity

The EA Exam Institute™ (EEI) invites visionary leaders and experts to share their knowledge, experience, and insights with our distinguished community of tax professionals.

Would you like to gain national recognition as a trusted authority in your field? This is your opportunity to influence the next generation of tax professionals while strengthening your own visibility and impact across the industry.

We proudly welcome Enrolled Agents, CPAs, Tax Attorneys, Financial Strategists, and subject-matter experts to present at upcoming EA Exam Institute™ conferences and webinars, where education meets innovation and leadership defines the experience.

Overview of Opportunity

As part of our ongoing mission to deliver cutting-edge education to our members and attendees, we invite you to submit a proposal to speak at future EEI events. Conference sessions typically run 20 to 30 minutes, while webinars are 60 minutes.

These events provide a powerful platform to showcase your expertise, build influence, and connect with professionals shaping the future of tax representation, compliance, and strategy.

Proposals submitted for one event may also be considered for additional conferences or webinars at the discretion of the EEI selection committee. If selected, speakers will receive training and presentation support to ensure an impactful and professional delivery. Proposals featuring collaborative or multi-presenter formats will also be considered.

Preferred Topics

We welcome executive-level presentations in the following areas:

Tax Mastery and Compliance

- IRS Representation and Complex Case Resolution
- Tax Law Innovation and Federal Policy Developments
- Audit Preparation, Risk Mitigation, and Due Diligence
- Errors and Omissions Insurance and Risk Management
- Criminal Tax Investigations and White-Collar Defense
- Fraud Detection, Prevention, and Internal Controls

Firm Operations and Leadership

- Systems, Automation, and Workflow Optimization
- Business Growth, Mergers, and Leadership Strategy
- Scaling Multimillion-Dollar Firms
- Strategic Branding for Tax Leaders
- Client Management, Retention, and Team Development

Preferred Topics

Emerging Financial Trends

- Cryptocurrency, Digital Assets, and IRS Reporting Obligations
- Ethical Representation in Emerging Industries
- Technology, AI, and the Future of Tax Compliance

Practice Expansion and Sustainability

- Bookkeeping and Financial Infrastructure for Scalable Growth
- Advanced Tax Strategy and High-Net-Worth Client Management
- Wealth Planning, Succession, and Legacy Building

Speaker Selection Criteria

We are seeking high-impact speakers who demonstrate:

- Expertise in tax law, IRS representation, financial strategy, or leadership.
- Executive-level experience within multimillion-dollar firms or organizations.
- Recognized authority as an author, educator, or industry thought leader.
- Dynamic presentation skills that inspire action, clarity, and growth.

Your presentation should:

- Deliver actionable strategies that professionals can implement immediately.
- Integrate technical depth with forward-looking business insight.
- Reflect EEI's commitment to excellence, ethics, and elevation.
- Offer practical solutions for the operational, financial, and legal challenges of modern tax practice.

Speaker Benefits

- **National Recognition:** Gain visibility as an authority in your field and a trusted voice within the EEI network.
- **Strategic Access:** Engage with top-tier professionals and decision-makers shaping the industry.
- **Professional Prestige:** Be featured in EEI's digital campaigns, conferences, and media outlets.
- **Community Impact:** Play a direct role in advancing the profession while mentoring the next generation of leaders.

Submission Process

To submit a proposal:

1. Visit www.irseaexam.com/speakers and select Submit New Proposal.
2. Complete the application, including:
 - Presentation title and executive summary (250 words max)
 - Speaker bio and credentials
 - Relevant speaking experience or presentation sample

Join the Movement

The EA Exam Institute™ Executive Selection Committee reviews all submissions based on expertise, innovation, and alignment with EEI's mission. Shortlisted speakers may be asked to submit a 2–3 minute introductory video outlining their presentation concept and delivery approach.

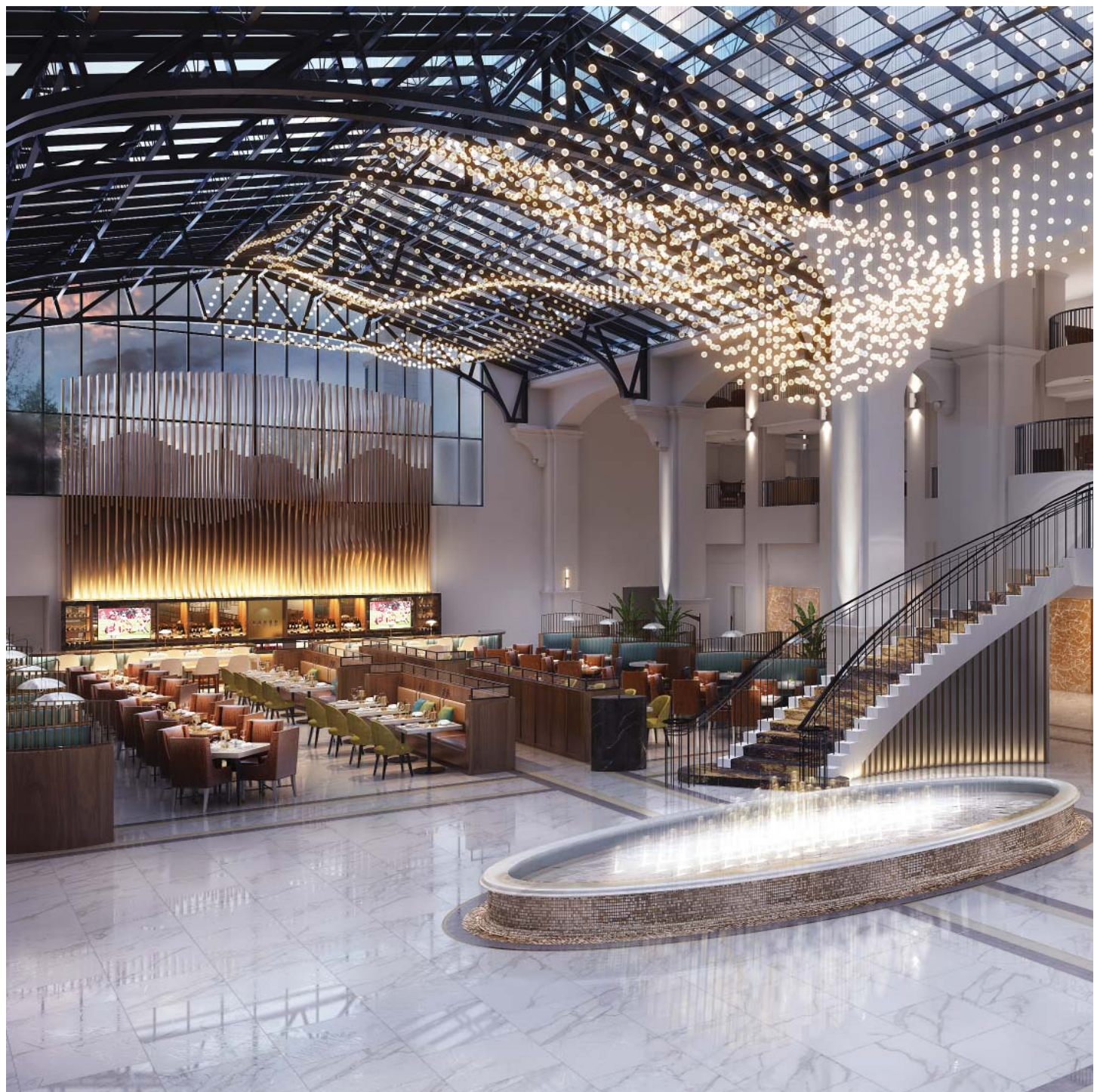
The EA Exam Institute™ is more than a platform, it's a powerhouse of influence, education, and collaboration. We are building a network of industry trailblazers who are not only transforming their firms, but also defining the future of the tax profession.

Join us. Share your voice. Shape the standard of excellence in the tax world.



Melinda Tolbert, EA

A handwritten signature in black ink that reads "Melinda Tolbert".



CHÂTEAU ÉLAN WINERY & RESORT

WELCOME TO ATLANTA'S PREMIER CONFERENCE DESTINATION



A PERSONALIZED COMMITMENT TO EXCEED YOUR HIGHEST EXPECTATIONS

The Inn at Château Élan is designed to provide guests with the utmost feeling of relaxation and approachable luxury. Capturing the French country's architectural flair, the resort's 329 rooms and suites revolve around French blue with muted shades evocative of the sun-drenched Mediterranean. Our fresh take on French estates incorporates soft golds, creams, blues and browns throughout to promote a warm air of comfort and well-being. The luxurious bedding package boasts embroidered white linens atop a cushy pillow-top mattress — key ingredients for a good night's rest following a full day of activities. Each guest room has a large work desk, high-speed wireless internet, flat-screen television, mini-fridge, terrycloth robes and a lavish bathroom with an oversized tub and separate shower. Guests also have access to a fitness center, outdoor pool and hot tub.

Château Élan takes pride in its commitment to personal attention and guest services, along with a desire to exceed your highest expectations. It offers a unique sense of place staffed with hospitality professionals from around the world, contributing a captivating international flavor to the resort. The warm and cheerful ambiance that greets you upon arrival and accompanies you throughout your stay makes Château Élan an all-around gratifying venue.



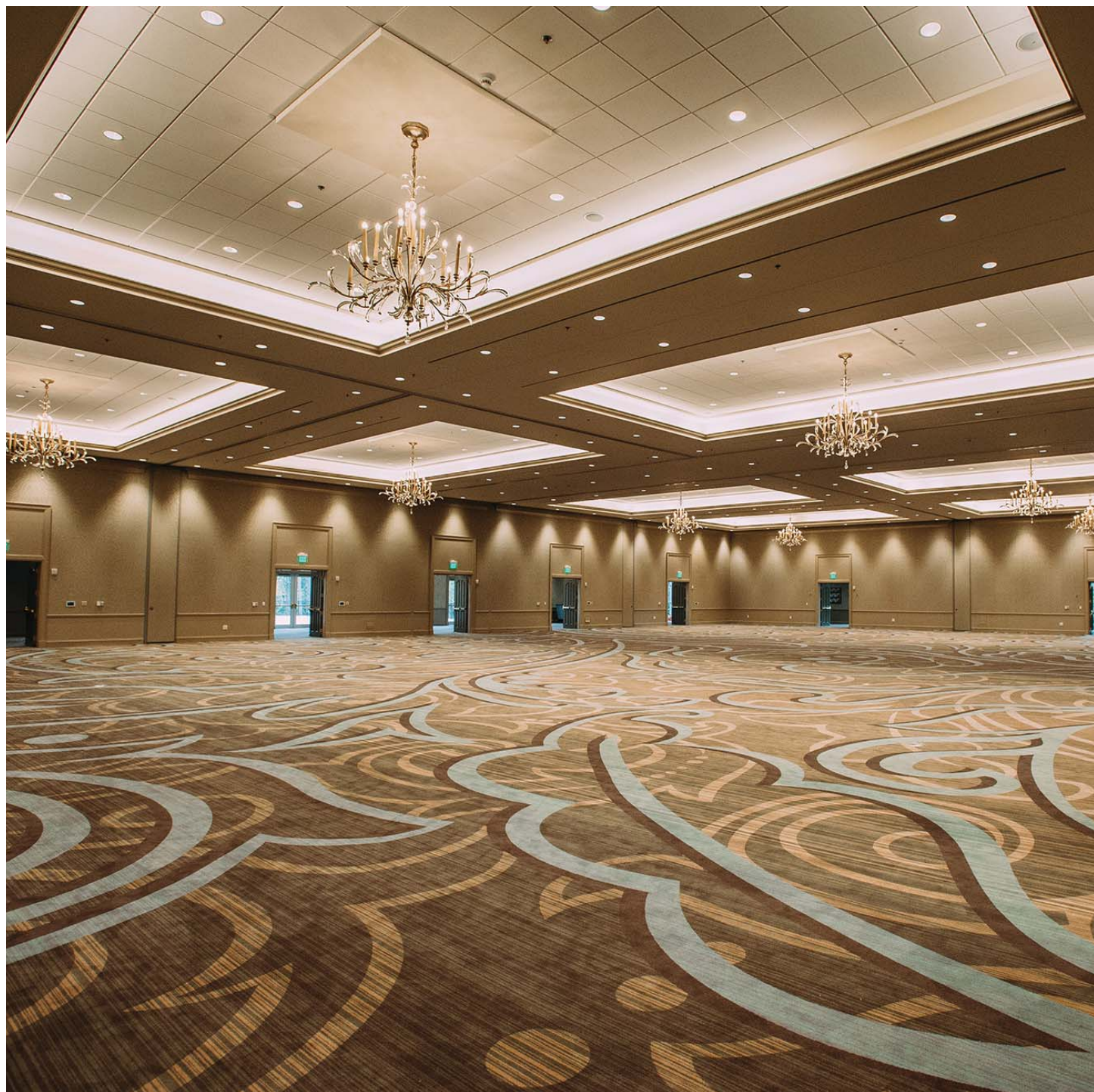


A DEDICATED PROFESSIONAL STAFF TO FACILITATE YOUR BUSINESS



With our 40,000 square-foot conference center, 10,000 square feet of outdoor meeting space, state-of-the-art technology and dedicated professionals on staff, we make your goals our goals. From meeting rooms to grand ballrooms, the facility can accommodate groups of 15 to 1500, fulfilling all of your needs to host productive meetings. The 20 meeting rooms feature permanent refreshment kiosks and individual access to the outdoors. The stepped auditorium with a fixed stage seats 60 attendees, providing a remarkable environment for any presentation. With Château Élan's superior facilities and continued commitment to excellence, its unrivaled record of success has earned it numerous awards as a top meeting destination.





MAGNIFICENT VENUES ENCOURAGE AGENDAS LIMITED ONLY BY IMAGINATION



Château Élan's 3,500 acres of diverse landscapes and venues, combined with a creative staff of conference professionals, will turn your imagination into reality. An array of outings and activities await you. Whether you prefer fun and light-hearted events beneath Georgia's blue skies or dramatic evenings under starry nights, Château Élan has it all. You can plan an active day outdoors with company tournaments and instructional clinics, then unwind over gourmet food and wine in the evening.





MEMORABLE MEETINGS ARE LIKE A FINE WINE, BOTH HAVE A NICE FINISH

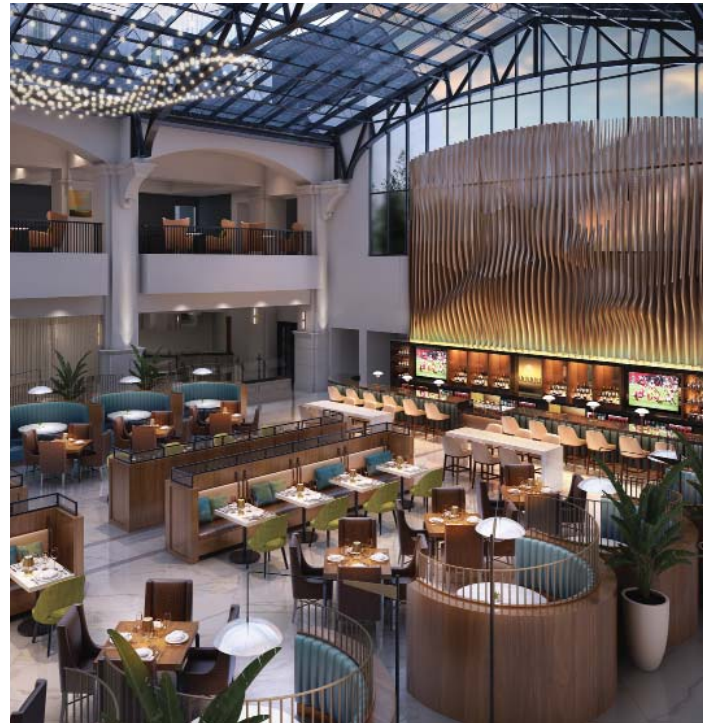


The winery features 11 distinct venues for meetings, banquets and receptions accommodating between 30 and 500 guests. The rustic setting of the cask room creates truly unforgettable events for your attendees with themed dinners and receptions.

Guests can network over our award-winning selection of more than 28 wines with private winery tours and tastings, attend interactive classes in our Viking® culinary studio, and participate in teambuilding exercises such as winemaking workshops and wine blending classes.







WINES & SUCCULENT DISHES – A DECADENT CULINARY ADVENTURE.

Château Élan's expert team of culinary professionals craft an array of international dishes with a regional flair. The 7 distinctive dining outlets offer cuisine ranging from thoughtfully-crafted pub fare at the spirited Paddy's Irish Pub to succulent spa cuisine at Fleur de Lis. The resort takes pride in using locally-sourced produce in its dishes as highlighted at Marc which features a hand-curated menu featuring regional favorites. Menus for banquets and catered affairs are designed around superb ingredients and seasonal considerations, and are complemented with artisan sauces carefully prepared with depth and flavor. The diverse range of dining options available throughout the resort, enhanced with the bounty of award-winning wines, is sure to provide guests with a delectable experience that perfectly suits their palate and your busy schedule.



COMING TOGETHER IS A BEGINNING. KEEPING TOGETHER IS PROGRESS.
WORKING TOGETHER IS SUCCESS.

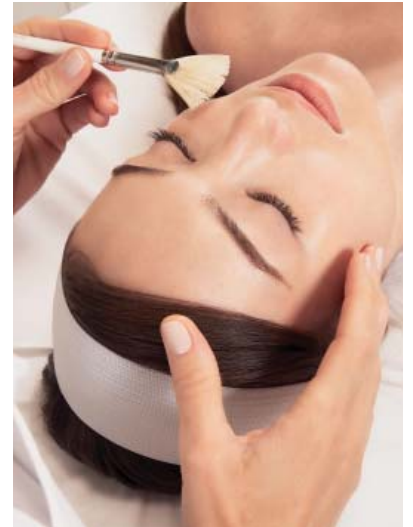
Château Élan and its one-of-a-kind amenities guarantee immensely rewarding meetings. The 3,500-acre estate is rich with diverse landscapes that not only make great venues, but also encourage fun, interactive teambuilding activities. Our expert team of planners can customize experiences that are perfectly tailored to your company's goals, from relationship-strengthening indoor and outdoor team activities to motivational community outreach initiatives. Bring your own equipment or rent the latest models here and we'll create private company golf tournaments or tennis matches. Guests can also play volleyball, basketball, hike and bike our expansive nature trails, or work out at the health club, followed by a refreshing plunge in our outdoor pool.





A BEGUILING SETTING FOR A WELL DESERVED SOJOURN

Celebrated as Atlanta's only spa destination experience. The Spa at Château Élan rejuvenates the body, mind and soul. The 35,000-square-foot full-service European spa is nestled inside a lakeside mansion featuring 14 luxurious overnight guest rooms that are surrounded by a canopy of forest trees, emerald green lawns and flowering shrubs. The Spa's own healthy gourmet restaurant Fleur-de-Lis contributes to an all-over feeling of wellness and relaxation, which can be enjoyed before or after treatments in the comfort of your robe and slippers. Whether it's between demanding conference schedules or for an extended stay, the Spa, with 35 treatment rooms, a staff of 90 and 14 luxury overnight guest suites, is a superbly relaxing experience like no other.





THE SOUTH'S PREMIER TOURNAMENT EXPERIENCE

Few places resonate more with a sheer sense of pleasure and challenge than on Château Élan's 45 holes of championship golf. Memorable views of undulating fairways, cool lakes, tree-lined holes and tightly woven carpets of greenery punctuated with clever sand traps will delight players of every caliber. For an entertaining and interactive experience during your group's stay, we can arrange golf tournaments for up to 450 participants, as well as individual or group lessons and clinics hosted by the respected Dave Pelz Scoring Game School. The beautiful 1,100 yard, nine-hole par-3 Executive Course is an ideal venue for group night golf outings or for players who do not have time for a full 18. Golf amenities include a full-service renovated clubhouse and pro-shop managed by Troon, Sarazen's Bar & Grille, a large golf pavilion, and 14 two, three and four bedroom luxurious golf villas and cottages.



