



August 16 – 18, 2007
Grand Rapids, Michigan

Thursday, August 16, 2007

- 9:00 a.m. – 5:00 p.m. Arrival and check in at
Courtyard by Marriott
11 Monroe Avenue, NW
Grand Rapids, MI 49503
616-242-6625
- 12:30 p.m. Golfers depart from hotel lobby for 1:20 tee time
Thousand Oaks Golf Course; Co-sponsor: Jackson National
- 6:30 p.m. Dinner – **Cascade Hills Country Club**
Sponsored by Columbus Life Insurance Company

Friday, August 17, 2007

- 7:00 a.m. – 7:30 a.m. Breakfast - Sponsored by Jackson National
- 7:30 a.m. – 7:45 a.m. Welcome & Housekeeping
- 7:45 a.m. – 9:15 a.m. “Good to Great – From Selling to Serving”
Jackson National Life
Steve Luckenbach & Michelle Tidey
- 9:15 a.m. – 9:30 a.m. Break
Sponsored by OneAmerica
- 9:30 a.m. – 10:30 a.m. “Global Underwriting/Reinsurance Overview & Update”
Columbus Life
Keith Brown, Underwriter
Charles W. Wood, Jr., CLU, ChFC, LUTCF
Pam Kalkhoff, Regional Mktg.
- 10:30 a.m. – 12:00 p.m. “Exit Strategies”
John Hancock
Dru Donatelli, CLU, ChFC, JD-MBA
“Something About 60”
Mark Pappas
- 12:00 p.m. – 1:00 p.m. Lunch sponsored by Jackson National Life

- 1:00 p.m. – 1:45 p.m. “LEAP Software”
Edwin W. Thauer, Jr., CLU, ChFC
- 1:45 p.m. – 2:00 p.m. Break
Sponsored by OneAmerica
- 2:00 p.m. – 5:00 p.m. **Afternoon with Gene Mahn, CLU, ChFC, CLTC**
- 6:30 p.m. Dinner – **Charlie’s Crab** sponsored by John Hancock

Saturday, August 19, 2006

- 7:00 a.m. – 7:30 a.m. Breakfast sponsored by:
PACE Financial Group, LLC/McCready & Keane, Inc.
- 7:30 a.m. – 9:45 a.m. Wealth Transfer/Charitable Planning with IRA & QRP Assets
OneAmerica
Greg Purvis, JD, CLU, ChFC
“Asset Based Long Term Care”
State Life
Joe Hayes
- 9:45 a.m. – 10:00 a.m. Break
Sponsored by OneAmerica
- 10:00 a.m. – 10:30 a.m. Member Presentation
John Clarke on Private Split Dollar
- 10:30 a.m. – 11:15 a.m. Member Case
Ed Thauer on LEAP Interest Rate Move
- 11:15 a.m. – 11:45 p.m. Pinnacle Study Group Business Meeting
- 11:45 p.m. – 12:15 p.m. Lunch sponsored by Jackson National
- 12:15 p.m. Golfers depart from hotel lobby for 1:30 tee times –
Cascade Hills Country Club
- 1:30 p.m. – 5:30 p.m. Golfing and other Grand Rapids venues for Non-Golfers
- 6:00 p.m. Ed Thauer’s Office Tour: Design Underwriting, Inc.
985 Parchment Drive, SE,
Grand Rapids, MI 49546
- 6:45 p.m. Cocktails and Dinner – **Ed’s Home**
1875 Wilmont, Kentwood, MI 49508
Sponsored by OneAmerica