



THE PINNACLE STUDY GROUP, INC.

AGENDA

**February 17-21, 2010
Amelia Island, Florida**

Wednesday, February 17th

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| 9:00 a.m. – 5:00 p.m. | Arrival and check in at
The Ritz Carlton Amelia Island
4750 Amelia Island Parkway
Amelia Island, FL 32034 |
| 9:00 a.m. – 5:30 p.m. | Golf and Fishing at members' expense |
| 6:00 p.m. | Depart from The Ritz Carlton for dinner at
The Marina Seafood Restaurant
101 Centre Street
Fernandina Beach, FL |
| 6:30 p.m.-9:30 p.m. | Cocktails with dinner to follow |

**For those going straight to The Marina Seafood Restaurant from leisure activities or late arrivals, there is public parking across the street from the restaurant.*



Thursday, February 18th

- 6:30 a.m. – 7:30 a.m. Breakfast and Welcome from host, **Jim Forbis, CLU, ChFC, CSA, AIF**
Housekeeping Items
Introduction of Dan Danese, CFP, CLU & Irwin Zagoria, Provisional Members
- 7:30 a.m. – 8:30 a.m. **Dan Danese, CFP, CLU, President Legacy Solutions, Inc.**
Irwin Zagoria, President, IMZ Financial Services Corporation
- 8:30 a.m. – 9:30 a.m. **Matt Ferreri, Regional Sales Vice President, MetLife**
MetLife Investors' Total Protection Strategy for Today's Rollover Market
Kimble Skov, Account Manager, Pimco
Investing in the New Normal
- 9:30 a.m. – 10:00 a.m. **Grant Foster, CLU, ChFC, AEP**
Promises Made Promises Kept, Death Claims that Made a Difference
- 10:00 a.m. – 10:15 a.m. Break
- 10:15 a.m. – 12:00 a.m. **Matt Lynch, President & CEO of Capital Analysts Incorporated**
Tom Giachetti, Esq., Stark & Stark Attorneys at Law
Structuring an Internal or External Sale: Legal Agreements & Due Diligence
Q&A Included
- 12:00 a.m. – 1:00 p.m. Lunch
- 1:30 p.m. – 5:30 p.m. Golf at **Amelia River Golf Course** or other leisure activity
- 6:30 p.m. Depart from The Ritz Carlton for dinner at
Le Clos Café-Restaurant Provencal
20 South Second Street
Amelia Island, FL
- 7:00p.m. - 10:00 p.m. Cocktails with dinner to follow



Friday, February 19th

6:30 a.m. – 7:30 a.m.	Breakfast
7:30 a.m. – 7:45 a.m.	Housekeeping Items
7:45 a.m. – 8:30 a.m.	Mark Teitelbaum, Vice President, Advanced Markets, Axa Distributors <i>Issues Surrounding Employer Owned Life Insurance</i>
8:30 a.m. – 9:00 a.m.	Pam Kalkhoff, CLU, Regional Marketing Director, Columbus Life <i>Columbus Life 2010 – What's New</i>
9:00 a.m. – 9:30 a.m.	Steve Reese, Regional Vice President, John Hancock Annuities <i>Great Expectations</i>
9:30 a.m. – 9:45 a.m.	Break
9:45 a.m. – 10:30 a.m.	Tom Commito, JD, LL.M, CLU, ChFC, Director Sales Concepts, Lincoln <i>Roth IRA Conversions</i>
10:30 a.m. – 11:00 a.m.	Ed Thauer, CLU, LIC, ChFC <i>LEAP/Wealth in Motion Software Case</i>
11:00 p.m. – 12:00 p.m.	Paul Pistilli, CFP, CLU, ChFC, Managing Principal, Mid-Atlantic Highland Capital <i>Navigating the Process... From Plan, to Product, to Placement...</i>
12:30 p.m. - 1:30 p.m.	Lunch
1:30 p.m. – 5:00 p.m.	Golf at Amelia National Golf Club or other leisure activity
2:30 p.m.	Ladies: Depart from The Ritz Carlton for Wine Tasting at Intercoastal Wine Company
6:00. p.m.	Dinner on Own



Saturday, February 20th

6:30 a.m. – 7:30 a.m.	Breakfast
7:30 a.m. – 8:00 a.m.	Housekeeping Items
8:00 a.m. – 8:45 a.m.	Micki Hoesly, CLU, ChFC, President, Resource One Financial Advisors <i>Winning Strategies for Investing in Mutual Funds</i>
8:45 a.m. – 9:30 a.m.	Buzz Hankinson, CLU, ChFC, Hankinson Wealth Management, Inc. <i>Sales Ideas and People Skills that Will Make You Millions</i>
9:30 a.m. – 9:45 a.m.	Break
9:45 a.m. – 10:30 a.m.	Ben Stewart, Regional Sales Director, Midland National Life Jerry Blair, Senior Vice President, Midland National Life Patrick Bowen, Sales Vice President, Midland National Life <i>An Enduring Partnership</i>
10:30 a.m. – 11:00 a.m.	Dick Herrick, CLU, ChFC <i>Experiences and Relationships Are What Make Us Unique</i>
11:00 a.m. – 11:30	Gregg Beemer <i>Good Old Fashioned Insurance</i>
11:30 a.m. – 12:00 p.m.	Pinnacle Business Meeting
12:00 p.m. – 1:00 p.m.	Lunch
1:00 p.m. – 5:00 p.m.	Golf at The Ritz Carlton or other leisure activity
6:30 p.m. – 9:30 p.m.	Dinner at The Ritz Carlton's Salt Restaurant



Sunday, February 21st

Departures and Free Time