



11:00 AM – 11:05 AM	Break
11:05 AM – 12:05 PM	* Steve Baumgartner, CEO – <i>New Peaks/Habit Change Co.</i> <i>Title:</i>
12:20 PM	Depart for Golf or Pro Football Hall of Fame (box lunch provided)
1:25 PM	Canterbury Golf Club – <i>Hosted by David Willkomm, Met Life</i> W. Minich                      E. Thauer M. Arnold                      J. Laurent D. Danese                      G. Swain B. Wright
7:30 PM	Depart for Chinato's from Ritz Carlton lobby
7:45 PM	Cocktails and Dinner at Chinato's with our Sponsors

<b>FRIDAY, AUGUST 19</b>
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6:30 AM – 7:25 AM	Breakfast and Meetings   Riverview Room
7:30 AM – 8:30 AM	Douglas A. Ewing, JD, CLU, Special Markets Attorney – <i>John Hancock</i> <i>Title: "Spousal Legacy Planning"</i>
8:30 AM – 9:30 AM	Ed Leisher – <i>Agency ONE Insurance Marketing Group, LLC</i> <i>Title: "Two Innovative Technologies Guaranteed to Increase Revenue!"</i>
9:30 AM – 9:40 AM	Break
9:40 AM – 10:40 AM	Hugh F. Smart, JD, CLU, ChFC, AVP – Director of Advanced Markets <i>Columbus Life</i> <i>Title: "Common Failures in Business Succession Planning"</i>
10:40 AM – 11:40 AM	Richard D. Landsberg, JD, LLM, CLU, ChFC, RFC, AIF® <i>Nationwide Financial Services</i> <i>Title: "Perceptions of Concepts – Ideas Fast and Furious"</i>
11:40 AM – 11:45 AM	Break
11:45 AM – 12:45 PM	David Coughlin, Div. Vice President – <i>TransAmerica Capital, Inc.</i> <i>Title: "Unlocking Social Security"</i>
12:45 PM – 2:00 PM	Lunch and Business Meeting   The Diplomat Room
2:30 PM	Depart for Private Cruise from Ritz Carlton Lobby
3:00 PM – 5:00 PM	Private Cruise on the Cuyahoga River
5:30 PM	Cocktails and Dinner at The Shoreby Club

**SATURDAY, AUGUST 20**

6:30 AM – 7:25 AM Breakfast and Meetings | Riverview Room

7:30 AM – 8:30 AM Mike A. Owens, CLU, ChFC, RFC – *Strategic Legacy Advisors, Inc.*  
Title: *"Eleven Years Later . . . . A Collaborative Experience Worth Sharing"*

8:30 AM – 9:30 AM Jim S. Forbis, CLU, CSA, AIF, ChFC – *CFH Financial Services, Inc.*  
Title: *"Retirement Planning – Security and Peace of Mind"*

9:30 AM – 9:40 AM Break

9:40 AM – 10:40 AM Dan Danese, CFP®, CLU – *Legacy Solutions, Inc.*  
Title: *"Sticky Fingers – A Process Through Which to Cement Relationships"*

11:00 AM Depart for Golf and Alternate Golf Activity (box lunch provided)

12:45 PM Golf @ Firestone Country Club – *Hosted by ValMark Securities, Inc.*  
W. Minich G. Beemer  
G. Swain M. Arnold  
G. Foster B. Wright  
C. Callahan M. McClary

7:30 PM Depart for Johnny's from Ritz Carlton lobby

7:45 PM Cocktails and Dinner at Johnny's

**SUNDAY, AUGUST 21**

All Day Departures