

Wednesday February 15th, 2017
Charleston, SC









AGENDA

Members arriving at various times

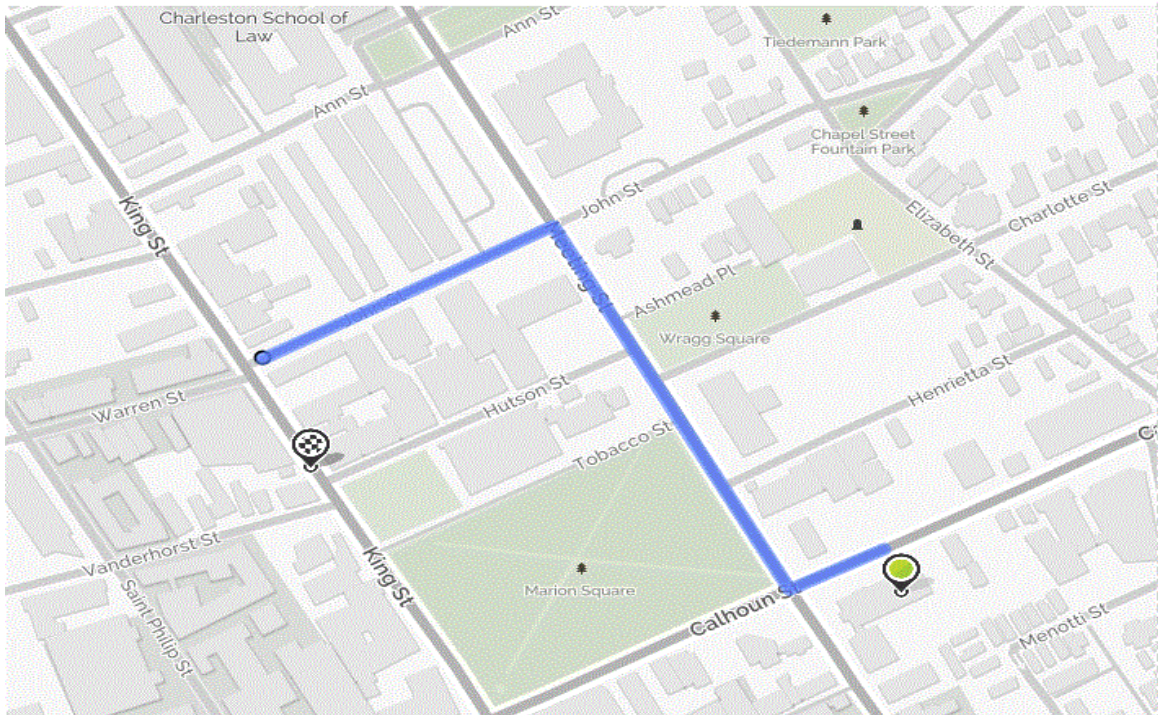
5:15 – 5:30 Meet in Hotel Lobby to walk over to dinner

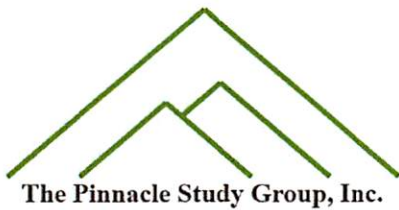
5:45 Opening dinner at Coast Bar and Grill

COAST Bar and Grill...39 D John Street The restaurant is down a small side street with several restaurants.

-  1. Start out going **southwest** on Calhoun St toward Meeting St. 
..... Then 0.04 miles 0.04 total miles
-  2. Turn **right** onto Meeting St. 
..... Then 0.19 miles 0.23 total miles
-  3. Turn **left** onto John St. 
..... Then 0.13 miles 0.36 total miles
-  4. Coast, 39D JOHN STREET. 

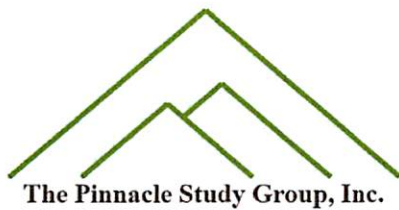
Use of directions and maps is subject to our [Terms of Use](#). We don't guarantee accuracy, route conditions or usability. You assume all risk of use.





Thursday, February 16, 2017
 Charleston, SC
AGENDA

Start	End	Topic /Speaker/Sponsor
10:30	11:20	Business Meeting/Lunch- Cypress Ballroom- Marriott Hotel
11:20	11:30	TRANSITION BREAK
11:30	12:00	Life Insurance- Dual Financing Techniques Speaker: Joe Scianna Sponsor: John Hancock
12:00	12:30	Protection UL & Vitality- A different approach to costs and crediting rates. Speaker: Bruce McGuirk Sponsor: John Hancock
12:30	12:40	TRANSITION BREAK
12:40	1:30	Product Ideas in Advanced Trust Planning Speaker: Kurt Kaufman Sponsor: Jackson National
1:30	1:40	TRANSITION BREAK
1:40	2:30	It's a Numbers Game: It's about the "Cash Flow" not the "Cash Pile" Speaker: Joe Anderson III & Jason Brown Sponsor: Prudential Investments –
2:30	2:40	TRANSITION BREAK
2:40	3:30	PSG Group Case Study: Breakout Session- # 1 Roger & Demi Moore –SWOT Analysis
3:30	3:40	TRANSITION BREAK
3:40	4:30	Investment Markets: How they affect insurance product design. Speaker: Roger M Lanham Sponsor: Fort Washington
4:30	4:40	TRANSITION BREAK
4:40	5:30	Tax advantaged investing- Navigating the Municipal Bond Markets Speaker: Adam Weigold Sponsor: Eaton Vance Investments
5:30	5:40	Final Comments and Meeting Adjourned
6:15		Depart for Dinner (Meet in Hotel Lobby)
6:30		Dinner at MacIntosh (8 min walk from hotel)

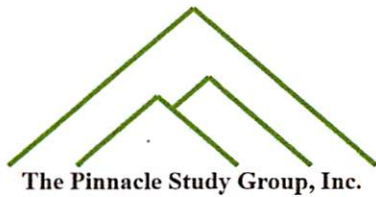


Friday, February 17, 2017
 Charleston, SC
AGENDA

Start	End	Title	Speaker/Sponsor
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****Note: Friday's meeting will be held in the College of Charleston's TD Arena
 Take left out of the hotel, cross Calhoun Street go left, The Arena is on Meeting St. The stairs
 leading into the meeting space are on the right. It is a 1-2 minute walk.**

Morning:		Breakfast on your own	
11:30	12:20	Lunch	Held in the TD Arena (see directions above)
12:20	12:30	TRANSITION BREAK	
12:30	1:20	Thinking Ahead for Retirement - Index Annuities and other Product Strategies	Speaker(s): Eric Kuchler and Garey Stathes Sponsor: Global Atlantic
1:20	1:30	TRANSITION BREAK	
1:30	3:30	Fresh from the February Issue of the Journal of Financial Planning: Retirement Income Showdown: Risk Pooling vs. Risk Premium & other topics!	Guest Speaker: Wade Pfau – The American College of Financial Services
3:30	3:40	TRANSITION BREAK	
3:40	4:20	Intergenerational Split Dollar	Speaker: Doug Jacobs Sponsor: Nationwide
4:20	4:30	TRANSITION BREAK	
4:30	5:00	Solidifying Income Using Life Insurance, Post Retirement	Speaker: Brian Moldt
		Closing comments- Meeting Adjourned	
6:00		Depart for Dinner- Magnolias (Meet in Hotel Lobby to board bus to restaurant)	



The Pinnacle Study Group, Inc.

Saturday, February, 18th 2017
Charleston, SC

AGENDA

Start	End	Title	Speaker/Sponsor
7:00	7:30	Breakfast Served in the Cooper Room Marriott Hotel	
7:30	7:40	TRANSITION BREAK	
7:40	8:30	Financing Practice Acquisitions Speaker: John Turner Sponsor: Live Oak Bank	
8:30	8:40	TRANSITION BREAK	
8:40	9:30	“Where we’ve been, Where we are, and Where we are going” Speaker(s): Paul Pistilli Al Gibbons and Warren Steinborn Sponsor: Highland Capital Brokerage	
9:30	9:40	TRANSITION BREAK	
9:40	10:30	A New Market & New Opportunity- Speaker: Paul Pistilli Sponsor: AXA	
10:30	10:35	TRANSITION BREAK	
10:35	10:50	Projecting Living Expense during retirement Speaker: Chris Lund	
10:50	11:40	PSG Group Case Study: Breakout Session- # 2 Roger & Demi Moore –Recommendations and Analysis	
11:40	11:45	TRANSITION BREAK	
11:45	12:45	Business Meeting Jim Forbis	
12:45		Final Comments- MEETING ADJOURNED	