



The Pinnacle Study Group Inc.

2017 AUGUST MEETING

Indianapolis, IN

AGENDA

Aug. 16-19th

WEDNESDAY, AUGUST 16, 2017

ALL DAY

Attendees Arrive

Indianapolis Marriott North

3645 River Crossing Parkway

Indianapolis, IN 46240

6:00-9:00PM

Welcome Reception

SOLARIUM – 1st FLOOR

Program Chair – Brian Moldt

Cocktails & heavy Hors d'oeuvres

THURSDAY, AUGUST 17, 2017

All meetings in the SHIELDS ROOM

OPTIONAL

TOUR OF INDY 500

8:00AM

Meet in Lobby

Transport to Indy 500 via shuttle

8:30AM

Group Tour

Indy 500 Museum & Track

10:30AM

Transport

Transport to Marriott via shuttle

ALL ATTENDEES

11:00 - 12:00PM

LUNCH

HART ROOM

HOST: Adam Herakovich, Regional Director, MI, OH, IN, KY

SPONSOR: Morningstar

12:00PM

MEETING BEGINS

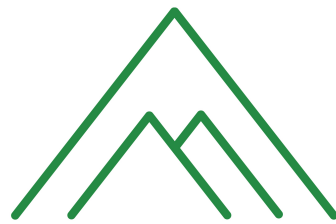
SHIELDS ROOM

Pledge of Allegiance

12:00 - 12:30PM

President's Report

SPEAKER: Jim Forbis, President, Pinnacle Study Group



The Pinnacle Study Group Inc.

2017 AUGUST MEETING

Indianapolis, IN

AGENDA

Aug. 16-19th

THURSDAY, AUGUST 17, 2017 *(continued)*

SHIELDS ROOM

This portion of the meeting coordinated by HIGHLAND CAPITAL BROKERAGE

INTRODUCTION: Paul Pistilli, CFP®, CLU®, ChFC®, Sales V.P., Mid-Atlantic

12:30 - 1:30PM **The Power of an Unkept IUL Strategy**

SPEAKER: James Hahn, Executive V.P. Life Sales & Distribution

SPONSOR: Annexus

1:30 - 2:30PM **Institutionally Priced Products for Business Owner Planning**

SPEAKER: To Be Announced

SPONSOR: John Hancock

2:30 - 3:30PM **BREAK**

3:30 - 3:40PM **Long-Term Care – Asset Care**

SPEAKER: Greg Purvis

SPONSOR: One America

3:40 - 4:10PM **Grow Your Practice with No Upfront Marketing Costs**

SPEAKER: Missy Aris, Account Executive

SPONSOR: White Gloves Workshops

4:10PM **Content Ends for the Day** **FREE TIME** *(dress for dinner)*

5:00PM **Meet in Lobby** **Transport to St. Elmo's via shuttle**

5:30PM **St. Elmo's Restaurant** **Reception**
127 S Illinois St,
Indianapolis, IN 46225

6:00-8:00PM **St. Elmo's Restaurant** **The Card Room**

8:00PM **Transport** **Back to Marriott via shuttle**

OPTIONAL **Drinks back at Marriott** **Lobby of Marriott North**



The Pinnacle Study Group Inc.

2017 AUGUST MEETING

Indianapolis, IN

AGENDA

Aug. 16-19th

FRIDAY, AUGUST 18, 2017

6:45 - 7:30AM *BREAKFAST (45 min. for breakfast)* **SHIELDS PRE-FUNCTION**

7:30AM **MEETING BEGINS** **SHIELDS ROOM**
Pledge of Allegiance

This portion of the meeting coordinated by CRUMP LIFE INSURANCE SERVICES

INTRODUCTION: Scott W. Conley, Regional Director

7:30 - 8:30AM **Opportunities in the Business Market:**
Business Owner & Executive Solutions
SPEAKER: **Will Heidbreder**, J.D., MBA, CPA, CLU, Advanced Solutions Dir.
SPONSOR: Principal Financial Group

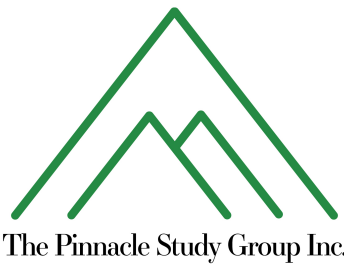
8:30 - 9:30AM **Rent the Asset**
SPEAKER: **Lina Storm**, CLU, ChFC, Director of Advanced Markets Operations
SPONSOR: Prudential

9:30 - 9:40AM *BREAK*

9:40 - 10:40AM **The Protective Way**
SPEAKER: **Stephen Malter**, CLU, ChFC, CFP, Divisional VP, Eastern Region
SPONSOR: Protective Life Insurance Company

10:40 - 11:40AM **Preparing for Changing Markets**
SPEAKER: **Brian Boulerice**, Senior Vice President of Business Development
SPONSOR: FS Investments

11:40 - 11:50AM *BREAK*



The Pinnacle Study Group Inc.

2017 AUGUST MEETING

Indianapolis, IN

AGENDA

Aug. 16-19th

FRIDAY, AUGUST 18, 2017 *(continued)*

SHIELDS ROOM

11:50 - 12:20PM **Times They Are a Changing... or Are They?**

SPEAKER: Perry Papadopoulos, Account Development Wholesaler

SPONSOR: M3 Financial

12:20 - 12:50PM **Jackson Overview**

SPEAKER: Tim Hays, CFS® - Reg. Vice President

SPONSOR: Jackson National Life

12:50PM **Content Ends for the Day FREE TIME**

EVENING

5:00PM **Meet in Lobby** **Transport to Broad Ripple Hotel via shuttle**

5:30PM **Broad Ripple Hotel** **Reception**
6508 Westfield Blvd.
Indianapolis, IN 46220

6:00PM **DINNER** **Buffet – Very Casual**

7:00PM **Brian Moldt's Band** **"The Porchmen" - on Porch of Hotel**

9:00PM **1st Shuttle leaves** **Back to the Marriott**

10:00PM **2nd Shuttle leaves** **Back to the Marriott**



The Pinnacle Study Group Inc.

2017 AUGUST MEETING

Indianapolis, IN

AGENDA

Aug. 16-19th

SATURDAY, AUGUST 19, 2017

7:00 - 7:45AM	<i>BREAKFAST (note only 45 min.)</i>	SHIELDS PRE-FUNCTION
7:45AM	MEETING BEGINS Pledge of Allegiance	SHIELDS ROOM
7:45 - 8:15AM	Pinnacle Business Meeting MEMBER: Jim Forbis , President, Pinnacle Study Group	
8:15 - 9:15AM	A Client's Perspective on Retiring SPEAKER: Mark A. Wilkerson , Executive Coach	
9:15 - 9:45AM	Reflections MEMBER: John Clarke	
9:45 - 10:00AM	<i>Break</i>	
10:00 - 10:30AM	DWP and Me... A History APPLICANT: Michael Abbate	
10:30 - 11:00AM	Mark Carolin MEMBER: Mark Carolin	
11:00 - 11:30AM	Business Killers MEMBER: Ed Thauer	
11:30 - 12:00PM	Teach 'n Learn: Gaining a Better Grip on Various Trusts MEMBER: Dan Danese	
12:00PM	Meeting Ends - Attendees Depart	