



August 21 - 24, 2014
Keystone Resort
Keystone, CO

Preliminary Meeting Agenda (subject to change)

Wednesday, August 20

Afternoon Check in at Keystone Lodge

Dinner on your own

Thursday, August 21

Check In at Keystone Lodge

7:15am

Golf at River Course

Golfers depart via rental vehicles or personal cars to golf course

Tee Times: 8:05am, 8:15am and 8:25am

NOTE: Green fees are guaranteed to the master account; Golfers to pay at pro shop

Other Activities Available At the Resort Include: Biking, Paddle Boating, Horseback Riding, Scenic Lift, Jeeping, Shopping, Spa, Tennis, Miniature Golf & Sailing

12:00pm - 12:45pm Lunch (In Silvers Meeting Room)

12:45pm - 1:00pm Welcome | John Clarke

1:00pm - 1:45pm State of the Investment World
Elvis Medica - Lincoln Investment

1:45pm - 1:55pm Break

1:55pm - 2:55pm Social Selling & Relationship Marketing for Huge Client Acquisition
Kevin Knebl - Kevin Knebl Communications, LLC

2:55pm – 3:00pm Break

3:00pm - 4:00pm Social Selling & Relationship Marketing for Huge Client Acquisition Cont....
Kevin Knebl - Kevin Knebl Communications, LLC

4:00pm - 5:00pm Income Generation from VA's
Leah Ryan – AIG & Fred Lassar - Invesco



August 21 - 24, 2014
Keystone Resort
Keystone, CO

Preliminary Meeting Agenda (subject to change)

Thursday, August 21 cont....

- | | |
|-----------------|---|
| 5:00pm - 5:15pm | Return to hotel rooms to freshen up before dinner |
| 5:30pm - 9:00pm | Chuck Wagon Dinner
NOTE: guests must check in at the Adventure Center by 5:30pm
Activity will take place rain, snow or shine. Recommended wear includes long pants, warm sweater or sweatshirt, boots or comfortable walking shoes. |

Friday, August 22

- | | |
|-------------------|--|
| 7:30am - 8:00am | Breakfast (In Silvers Meeting Room) |
| 8:00am - 8:15am | Housekeeping John Clarke |
| 8:15am - 9:00am | Life Insurance 360
Katie Lott - ValMark Securities Inc. |
| 9:00am - 9:45am | Opportunities with Columbus Life
Steve Sanders, CMO / Larry Silverstein, VP & Chief UW - Columbus Life |
| 9:45am - 10:00am | Break |
| 10:00am - 11:00am | Advance Planning Strategies
Kevin Cox, CLU, ChFC, CFP - Lincoln Financial Distributors |
| 11:00am - 12:00pm | The Time is Now!
Allison Clarke - Allison Clarke Consulting |
| 12:00pm | Tote Bag Lunch |
| 12:30pm | Golfers depart via rental vehicles or personal cars to golf
Golf at Ranch Course Tee Times: 1:30pm, 1:40pm and 1:50pm
NOTE: Green fees guaranteed to master account; Golfers pay at pro shop |
| 7:30pm | Dinner at the Little Horn Restaurant (in hotel) |



August 21 - 24, 2014
Keystone Resort
Keystone, CO

Preliminary Meeting Agenda (subject to change)

Saturday, August 23

- 7:00am - 7:45am Breakfast (In Silvers Meeting Room)
- 7:45am - 8:00am Housekeeping | John Clarke
- 8:00am - 8:45am **PRESENTATION NAME TBD**
Russ Bishop - Harvest Advisers, LLC
- 8:45am - 9:30am Anatomy of a TIC(K); A Story of the Past, Present and Future
Gregg Beemer - Capital Analysts of the Midwest, Inc.
- 9:30am – 9:45am Break
- 9:45am – 10:15am Changing the Dialogue – A Different Way to Talk with Clients About Planning
Dave Bernaus - Highland Capital
- 10:15am - 10:45am The Life of Brian (Provisional Member Presentation)
Brian Moldt – Moldt Financial
- 10:45am – 11:00am Break
- 11:00am – 11:45am How Did It All Work Out
Jim Forbis - CFH Financial Services Inc.
- 11:45am - Close Lunch and Business Meeting (In Meeting Room)
- Afternoon Travel and check into the Marriot West
- 4:30pm Dinner at John Clarke’s Home
350 Old Y Road, Golden, CO
NOTE: John’s house is 12 minutes from the hotel and 35 minutes from the airport

Sunday, August 24 Guests Depart