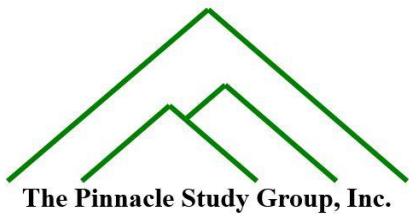


Thursday, August 18, 2016  
Little Rock, AR

# AGENDA

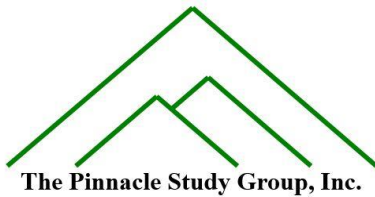
<i>Start</i>	<i>End</i>	<i>Title</i>	<i>Sponsor</i>	<i>Presenter</i>
12:00	12:50	Business Meeting/Lunch	Capital Hotel Baxter Parlor	Jim Forbis
12:50	1:00	<b>BREAK</b>		
1:00	1:55	Zero Estate Tax Planning	Pacific Southwest Financial	Rick Maholchic Chuck Wold
		Vitality/Step-It-Up Challenge	John Hancock Life Insurance Co.	Chris Martin
1:55	2:00	<b>TRANSITION BREAK</b>		
2:00	2:45	The Client Experience	Financial Concepts	Rhonda Ferguson
2:45	2:55	<b>BREAK</b>		
2:55	3:45	Examining Employee Stock Option Plans	Business Transition Advisors	Dan Zugell
3:45	3:50	<b>TRANSITION BREAK</b>		
3:50	4:35	Financial Planning and Reverse Mortgages, The Future!	SVP Strategic Initiatives	Peter Kallodaychsak Patty Wills
4:35	4:45	<b>BREAK</b>		
4:45	5:45	Market Update	Meeder Investment	Aaron Adkins
5:45	5:50	<b>Meeting Adjourned</b>		
6:20		Depart for Dinner	Samantha's Tap Room ( <i>Meet in Hotel Lobby</i> )	



Friday, August 19, 2016  
Little Rock, AR

# AGENDA

<i>Start</i>	<i>End</i>	<i>Title</i>	<i>Sponsor</i>	<i>Presenter</i>
7:00	7:30	Breakfast	Capital Hotel Baxter Parlor	
7:30	8:25	Navigating a Changing Tax Landscape	Jackson Variable Annuities	Orian Williams
8:25	8:30	<b>TRANSITION BREAK</b>		
8:30	9:15	Marketing to Foreign Business Owners	Transamerica Life Insurance – CRUMP	Travis Burke
9:15	10:00	Indexed Universal Life	AXA Equitable – CRUMP	Bill Schatz
10:00	10:10	<b>BREAK</b>		
10:10	10:40	Advanced Market Presentation	Columbus Life	Morgan Scott Jim Koth
10:40	11:25	Unlocking Social Security	Transamerica Variable Annuities	Ryan Bertrand
11:25	11:35	<b>BREAK</b>		
11:35	12:35	Fearless		Larry Brown
12:35	1:35	<b>LUNCH</b> ( <i>optional presentation</i> ) Capital Hotel Baxter Parlor	Charitable Planning	Mike Owens Dwain Owens
6:30		<b>DINNER</b>	Sonny Williams' Steak House	



Saturday, August 20, 2016  
Little Rock, AR

# AGENDA

<i>Start</i>	<i>End</i>	<i>Title</i>	<i>Sponsor</i>	<i>Presenter</i>
7:00	7:30	Breakfast	Capital Hotel Baxter Parlor	
7:30	7:55	Member Presentation	Pinnacle Study Group	Chris Lund
7:55	8:00	<b>TRANSITION BREAK</b>		
8:00	8:55	Advanced Planning Strategies	Highland Capital	Ted Gibbons Paul Pistilli
8:55	9:05	<b>BREAK</b>		
9:05	10:00	Estate Planning	Phelps Dunbar LLP	Greg Pirkle
10:00	10:05	<b>TRANSITION BREAK</b>		
10:05	10:30	Member Presentation	Pinnacle Study Group	Mark Carolin
10:30	10:55	Member Presentation	Pinnacle Study Group	Jim Forbis
10:55	11:05	<b>BREAK</b>		
11:05	11:30	Member Presentation	Pinnacle Study Group	Kevin Morse
11:30	12:20	Business Meeting		Jim Forbis
12:20		<b>MEETING ADJOURNED</b>		