



**The Pinnacle Study Group, Inc.**

## **AGENDA**

# **PETOSKEY/BAY HARBOR, MI AUGUST 19-23, 2015**

---

---

### Wednesday, August 19th

Noon - 5:00

Welcome and Arrival Registration

6:30 - 8:30 p.m.

Bay Harbor Welcome Reception (Drinks and Snacks on the back lawn, wear sensible shoes!)

### Thursday, August 20th

7:00 a.m.

Breakfast outside of Meeting Room

7:30 a.m. - 7:45 a.m.

Welcome & Pledge of Allegiance

7:45 a.m. - 9:15 a.m.

Crump Life Insurance Service, Andrea Caruso and Andrew Shane  
Speaker: Mike Amoia, JD, LLM, CFP, CLU, ChFC, "Tax Planning Strategies"

9:15 a.m. - 9:30 a.m.

Break

9:30 a.m. - 10:10 a.m.

Principal Financial Group, Ryan Goodchild  
Speaker: Patti Bell, CPA, CLU  
"Opportunities in the Business Marketplace"

10:10 a.m. - 11:00 a.m.

Jackson National - Doug H. Giblett, CFS  
Speaker: Kurt Kauffman, JD, LLM  
"Advanced Tax & Trust Planning Strategies"

11:00 a.m. - 11:50 p.m.	Transamerica - Minde Parks, RVP "Financial Planning in the Shadow of Dementia"
11:50 a.m. - 12:10 p.m.	Chris Lund (New Member)
12:10 p.m. - 12:15 p.m.	Morning Wrap Up
12:15 p.m. - 5:30 p.m.	Lunch and Afternoon on your own Golf at Bay Harbor/Other Activities
6:30 p.m.	Meet in Lobby for Dinner Transportation (Chandler's in Petoskey - Wine Cellar)

### Friday, August 21st

7:00 a.m.	Breakfast outside of Meeting Room
7:30 a.m. - 8:20 a.m.	Lincoln Financial Speaker: Glenn Usher
8:20 a.m. - 9:00 a.m.	Symetra Life Insurance Speaker: Steven Patrizio, CLU "Leveraging Wealth Transfer Using Private Financing"
9:00 a.m. - 9:10 a.m.	Break
9:10 a.m. - 10:00 a.m.	OneAmerica/American United Life - Patrick Foley Speaker: Dennis Martin, VP Chief Actuary "The Evolution of LTC Insurance"
10:00 a.m. - 10:40 a.m.	Highland Capital Brokerage Ted Gibbons and Dave Bernaus
10:40 a.m. - 11:10 a.m.	Columbus Life - Steven J. Sanders, LLIF Speaker: Hugh Smart, JD, CLU, ChFC "The DOL's Fiduciary Rule Proposal."
11:10 a.m. - 11:15 a.m.	Morning Wrap Up
11:30 a.m.	Meet in Lobby for Mackinaw Island Excursion with box lunches on the bus

1:00 p.m.	Ferry to Mackinaw
2:00 p.m. - 6:30 p.m.	Self-guided Tours of Grand Hotel, Fort, Downtown Shopping, Bicycle Rental Carriage Rides, & Fudge, Fudge, Fudge!
6:30 p.m.	Dinner at Iroquois Hotel Restaurant ( on Mackinaw Island)
9:00 - 10:30 p.m.	Ferry back to mainland and transportation back to Bay Harbor

Saturday, August 22nd

7:00 a.m.	Breakfast outside meeting room
7:30 a.m. - 7:45 a.m.	Summary of Forum Max Study Group
7:45 a.m. - 8:15 a.m.	Brian Moldt
8:15 a.m. - 9:15 a.m.	Al Gibbons
9:15 a.m. - 9:30 a.m.	Break
9:30 a.m. - 10:00 a.m.	Irwin Zagoria
10:00 a.m. - 10:30 a.m.	Ryan Boyd
10:30 a.m. - 11:00 a.m.	Wayne Minich
11:00 a.m. - 12:00 p.m.	Closed Business Meeting
12:00 p.m.	Lunch and Afternoon on your own Golf at Crooked Tree/Other Activities
6:30 p.m.	Meet in Lobby for Dinner in Bay Harbor

Sunday, August 23rd

11:00 a.m.	Guests Depart Hotel
------------	---------------------