



**THE PINNACLE STUDY  
GROUP, INC.**

**AUGUST 2012 | Omaha Nebraska**

**AGENDA**

**Wednesday, August 15**

TBD Golf  
TBD Dinner (Woody will arrange)

**Thursday, August 16**

**Breakfast buffet**

7:30am Tee time at Indian Creek **Note: Mike to arrange for course and transportation**

1:00pm-1:30pm Housekeeping, Introductions & Special Welcome  
**Mike Owens**  
***"A Legacy of Leadership" Susie Tietjen, CEO, Girard Securities Inc***

1:30pm-2:20pm ***"The World of Index Products"***  
***Bobby Samuelson, Samuelson Design***

2:20pm-2:30pm **Break**

2:30pm-2:50pm ***"Washington Insights"***  
***US Congressman Jeff Fortenberry,***  
***Nebraska 1<sup>st</sup> District***

2:50pm-3:00pm **Break**

3:00pm-3:50pm ***"A fabulous Pinnacle Panel"***  
***Wisdom and Insight from Wright, Clarke, Laurent & Minich***  
***Moderated by Mike Owens***

3:50pm-4:00pm **Break**

4:00pm-4:50pm ***"Charitable Estate Planning Ideas"***  
***Mark Tietelbaum-AXA Financial***

4:50pm-5:00pm **Break**

5:00pm-5:50pm ***"Non-Qualified Deferred Compensation"***  
***Mark Householder-Principal Life***

6:15pm Depart hotel lobby for dinner at Spencer's Steak House



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**Friday, August 17**

7:00am-7:25am	<b>Breakfast Buffet.....location will be posted AND announced</b>
7:30am-8:20am	<b><i>“Working with Paul and Highland” Paul Pistilli-Highland Capital</i></b>
8:20am-8:30am	<b>Break</b>
8:30am-9:20am	<b><i>“Clients for Life and Beyond, Why Clients Chose to Work With Me” Robert Slane, AEP, CLU – President, The Wealth Transfer Group</i></b>
9:30am-10:20am	<b><i>“Promises Made, Promises Kept” Robert Slane, AEP, CLU</i></b>
10:20am-10:30am	<b>Break</b>
10:30am-11:20am	<b><i>“New Opportunities in Existing CRT’s” David Murray-Sterling Foundation Management LLC</i></b>
11:20am-11:30am	<b>Break</b>
11:30am-12:20pm	<b><i>“Exciting ideas and utilizing V/A’s inside ILITS and other trusts ” John Koehler, CFP, ChFC, CLU, CRPC, VP Adv. Markets, Transamerica Capital</i></b>
12:30pm	<b>Depart hotel lobby for golf</b>
2:00pm	<b>Tee Time at Quarry Oaks</b> NOTE: Box lunch provided  <b><i>Depart hotel for alternate golf event – More information to follow</i></b> Note: Box lunch provided
TBD	<b>Cocktails and Dinner at Quarry Oaks</b> <i>Dinner sponsored by Columbus Life</i>



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**Saturday, August 18**

7:00am-7:25am	<b>Breakfast Buffet</b>
7:30am-8:10am	<b><i>Pinnacle Business Meeting</i></b>
8:10am-9:00am	<b><i>“New Member Presentation” Mark Carolin</i></b>
9:00am-9:10am	<b>Break</b>
9:10am-10:00am	<b><i>Dwain Owens, CLU, ChFC, RFC “Investing with Clarity---What we are doing with SMA’s Joint presentation with special guests, Mark Pearson &amp; Mark Clark Nepsis Capital Management</i></b>
10:00am-10:10am	<b>Break</b>
10:10am-11:00am	<b><i>Gregg Beemer “A great case to share with my Pinnacle brothers”</i></b>
11:00am-11:10am	<b>Break</b>
11:10am-12:00pm	<b><i>Mitch Arnold &amp; Irwin Zagoria “Pension Tag Team”</i></b>
12:00pm-12:30pm	<b>Pinnacle business meeting continued if needed</b>
12:30pm	<b>Depart hotel lobby for golf or alternate golf activity</b>
	<b>Tee time</b>
6:00pm	<b>Depart hotel lobby for Cocktails at The Owens’ Residence Dinner at <i>Brother Sebastians</i></b>