

**Pinnacle Study Group  
Meeting Agenda – August 2013**

**Tuesday, August 13<sup>th</sup>**

**Early arrivals to hotel**

**Wednesday, August 14<sup>th</sup>**

**Early arrivals to hotel**

**Thursday, August 15<sup>th</sup>**

**7:00AM Golfers leave hotel**

**7:30AM Golf at Hartefeld  
Course hosted Senior Open**

**Other Activities:  
Visit to Longwood Gardens (a must!)  
Shopping at nearby mall – tax free!**

**12:15PM Lunch at Hotel “Estate Deli Buffet”**

**1:00PM Meeting Opens**

**1:15PM ARIS Wealth Management  
Market outlook  
Allocating with alternatives successfully**

**2:05PM Clark Capital Management Group  
Fixed Income Outlook  
Tactical Fixed Income Strategy**

**2:55PM Break “Bakery Break”**

**3:10PM Inland REIT  
The good, the bad, the ugly of REIT investing**

**4:00PM** Franklin Square  
BDCs and Senior Secured Loans

**4:50PM** Break

**5:00PM** Lincoln Financial  
When to distribute income from living benefits?

**5:50PM** “Runnin’ down the road, trying to loosen my load...”  
A Pinnacle Panel Discussion

**6:40PM** Adjourn

**7:00PM** Depart for dinner at Hartefeld

**Friday, August 16<sup>th</sup>**

**7:00AM** Breakfast

**7:45AM** Frank Bevilacqua, CPA  
Growing your practice through prudent acquisitions

**8:45AM** Wayne and David Minich  
Succession Planning Afterthoughts

**9:40AM** Break “Bakery Break”

**9:45AM** Montpelier Advisors  
Utilizing Captive Insurance Concepts

**10:45AM** Break

**11:00AM** Depart for Gettysburg

**11:15AM** Columbus Life – Pam Kalkhoff

**1:30PM** Gettysburg Tour

**5:30PM** Cocktails & Dinner at the Blue Parrot Bistro

**Saturday, August 17<sup>th</sup>**

- 7:00AM Breakfast**
- 7:45AM Paul Pistilli**  
**An insurance market vision**
- 8:45AM Surprise Guest**
- 9:45AM Break** **“Sweet Treats Break”**
- 10:00AM Paul Pistilli**  
**GVUL**
- 11:00AM Kevin Morse**  
**Prospective Provisional Member Presentation**
- 11:30AM Jim Forbis**  
**Recent Writings**
- 12:00PM Business Meeting/Lunch** **“Estate Deli Buffet”**
- 1:30PM Golf at White Clay Creek**
- or**
- Horse Racing & Gambling at Delaware Park**
- or**
- Shot gunning at Oxford Gun Club**
- or**
- Longwood Gardens**
- or**
- Shopping**
- 7:30PM Dinner at The Rail**