

Pinnacle Study Group Meeting Agenda

Wednesday, February 17th

6:00 PM Welcome reception @ **Sheraton Crescent Hotel**
 Courtyard Reception Area
 Sponsored by Questar Capital Corp.
 Hosted by Scott Carlson, President, Questar Capital

Thursday, February 18th

Breakfast and lunch on your own, morning at your leisure

NOON-12:45 Business Meeting (Crestview Meeting Room) Sheraton Crescent Hotel

12:45-1:30 "Life Insurance as an Alternative Asset"
 Richard Forcht (Lincoln National/Crump Life Insurance Services)

1:40-2:30 "Evolution of Long Term Care"
 Shawn Britt (Nationwide/Crump Life Insurance Services)

2:40-3:30 "Rethinking Your Sales Process"
 Chuck Hollander Jr. (Red Flag Advantage)

3:40-4:30 Paul Mason (Fortress Risk Management)

4:40-5:30 "Ideas for Today's Advanced Planning Environment"
 Brett Berg (Prudential/Crump Life Insurance Services)

5:30 Closing Remarks

6:30 Dinner - Black Angus Steakhouse

Friday, February 19th

6:45 a.m. - 7:45 Breakfast (Crestview Meeting Room) Sheraton Crescent Hotel

7:45-8:35 "The New Variable Annuity Opportunity"
 Bill Lowe, President, Sammons Retirement Solutions

8:45-9:30 "Business Development"
 Evan Unzelman (Sterling Foundation Management)

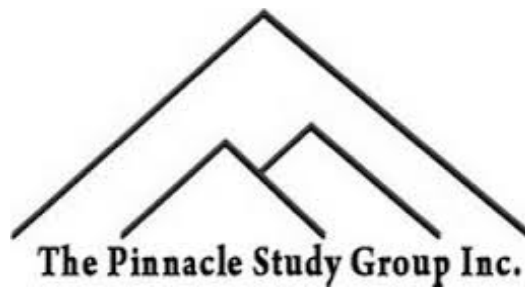
9:40-10:30 "Advanced Tax Planning Strategies"
 Kurt Kauffman (Jackson National)

10:40-11:30 "Creating a Cushion Against Market Volatility"
 Jason Willett (Penn Mutual/Crump Life Insurance Services)

11:40-12:30 "Essential Facts about Inherited IRAs"
 Shannon Evans JD.,LLM Taxation

12:30 Vouchers will be provided for lunch at your leisure

6:30 Dinner (Phoenix Garden) Sheraton Crescent Hotel



Saturday, February 20th

6:45-7:45	Breakfast (Crestview Meeting Room) Sheraton Crescent Hotel
	Member Presentations:
7:45-8:50	Grant Foster - "Prospecting, Back to the New Old Basics" Mike Owens - "Thoughts for Pinnacle Brothers" Guy Swain - "Retirement Distribution Planning"
9:00-9:50	"Premium Bond Financing, an innovative technique to fund life insurance premiums" Darin Duin (Tagge Rutherford Financial Group) Sponsored by Brandon Dirkschneider (Insurance Design Management)
10:00-10:20	Member Presentations: Ed Thauer
10:20-11:00	FSI/DOL Fiduciary Rule Discussion Jim Forbis - Moderator
11:10-Noon	Business Meeting
Noon	Adjourn and departures