



The Pinnacle
Study Group, Inc.
AGENDA
Winter 2008
Tucson, Arizona

Thursday, February 28, 2008

- 9:00 a.m. – 5:00 p.m. Arrival and check in at
Omni National
2727 West Club Drive
Tucson, AZ 85742
- 12:45 p.m. meet in lobby Golfers depart from hotel lobby for 1:00 tee time
Tucson National
- 6:00 meet in lobby Depart for dinner
6:30 p.m. Dinner at **Hacienda del Sol**
Sponsored by QA3 Financial Inc.
---**Steve Wild**, QA3 Chairman and Founder, special guest

Friday, February 29, 2008

- 7:00 a.m. – 7:15 a.m. Breakfast - and Welcome (Mike Owens, host)
- 7:15 a.m. – 8:15 a.m. “Indexed UL—Inside the Numbers-Inside the Market”
---**LaDale Young & Sam Pitt CLU, ChFC**
Columbus Life
- 8:15 a.m. – 9:00 a.m. “The Clients for a *Life Time* Process”
---**Guy Swain, CFP, CLU, ChFC**
- 9:00 a.m. – 9:10 a.m. Break
- 9:10 a.m. – 10:00 a.m. “The real estate life cycle and where the opportunities are in
today’s real estate market”
---**John Mayeron**
DBSI
- 10:00 a.m. – 10:50 a.m. “Power of the Platform”
---**Greg Verfaillie**
Curian Capital LLC
- 10:50 a.m. – 11:00 a.m. Break
- 11:00 a.m. – 11:30 a.m. “Peak Performance”
---**Dan Maurer**
Curian Capital LLC

11:00 a.m. – 11:30 a.m.	<p>“Peak Performance” ---Dan Maurer Curian Capital LLC</p>
11:30 a.m. – 12:20 p.m.	<p>“Curian Asset Management Process” ---Steve Young, CFA Curian Capital LLC</p>
12:20 p.m. – 1:00 p.m.	<p>Member Presentation...Lunch Sponsored by Ivy Funds “The Standby Trust” ---John Clarke, CLU, ChFC</p>
1:00 p.m.—1:50 p.m.	<p>“Unexpected Outcomes” ---Wright Edler ING/USA Annuities</p>
1:50 p.m. – 2:00 p.m.	Break
2:00 p.m. – 2:30 p.m.	<p>“Unexpected Outcomes continued” ---Wright Edler</p>
2:40 p.m. – 3:30: p.m.	<p>“REITS as part of the non-correlation” ---Dan Williams—Hines REIT</p>
3:50 p.m. – 4:00 p.m.	Break
4:00 p.m. – 4:50 p.m.	<p>“Natural Gas in the non-correlated picture” ---Chris Fiano—Penneco</p>
4:50 p.m. – 5:00 p.m.	Break
5:00 p.m. – 5:50 p.m.	<p>Member presentation...“Passing the Baton—How the Minichs are approaching practice continuation planning” ---Wayne Minich, CLU, ChFC</p>
6:15 p.m. depart Meet in lobby	<p>Dinner off site McMahon’s</p>



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Saturday, March 1, 2008

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| 7:00 a.m. – 8:00 a.m. | Breakfast & Begin Pinnacle Group Business |
| 8:00 a.m. – 9:00 a.m. | “Wealth Planning utilizing Renaissance”
Ted Batson, MBA, CPA, CFP
----- Renaissance Inc. |
| 9:00 a.m. – 9:50 a.m. | “A Recent case involving Renaissance”
Tim Reis, LUTCF |
| 9:50 a.m. – 10:00 a.m. | Break |
| 10:00 a.m. – 10:50 a.m. | “Relationships, Relationships, Relationships, its all about Relationships!”
Grant Foster, CLU, ChFC, AEP |
| 10:50 a.m.—11:00 a.m. | Break |
| 11:00 a.m. – 11:50 a.m. | “A day in the life of Jim Laurent”
Jim Laurent, CLU, ChFC |
| 11:50 ---- | Lunch and Pinnacle Group business meeting (if needed) |
| 6:45 p.m. | Golf and other venues
Cocktails and Dinner –
OMNI... |

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