

**February 18 – 22, 2015**

**Mokara Hotel**

**San Antonio, Texas**

**Wednesday, February 18, 2015**

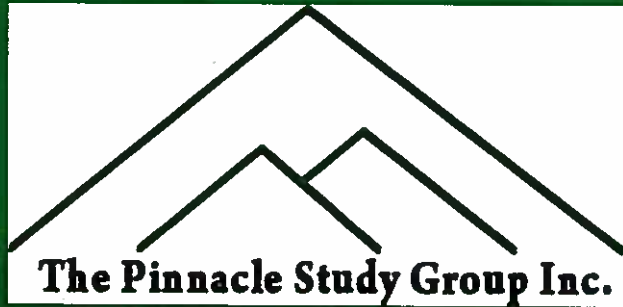
**8:00 a.m. to 5:00 p.m.**

**Welcome and Arrival Registrations**

**6:00 p.m. to 9:00 p.m.**

**Welcome Reception**

**Rooftop Terrace at Mokara Hotel  
Light Snacks**



**February 18 – 22, 2015**

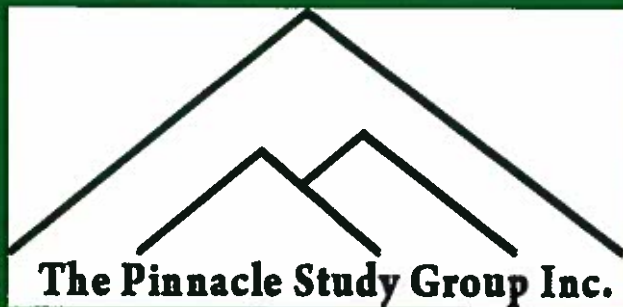
**Mokara Hotel**

**San Antonio, Texas**

## **Meeting Agenda**

### **Thursday, February 19, 2015**

<b>7:00 a.m. to 7:30 a.m.</b>	<b>Breakfast – Saddlery Room</b>
<b>7:30 a.m. to 7:40 a.m.</b>	<b>Welcome Housekeeping</b>
<b>7:40 a.m. to 8:30 a.m.</b>	<b>Closed Business Meeting – Members Only</b>
<b>8:30 a.m. to 8:40 a.m.</b>	<b>Wayne Minch – Pledge Training Members/Emeritus Members/Provisional Members</b>
<b>8:40 a.m. to 9:10 a.m.</b>	<b>Jackson National Tom Heffron</b>
<b>9:10 a.m. to 9:45 a.m.</b>	<b>Crump Insurance Andrea Caruso</b>
<b>9:45 a.m. to 10:00 a.m.</b>	<b>BREAK – Move to Riverwalk Room</b>
<b>10:00 a.m. to 10:45 a.m.</b>	<b>Pinnacle and Heritage – Joint Meeting Frank P. Bevilacqua II, CPA <i>The Dating Game</i></b>
<b>10:45 to 11:30 a.m.</b>	<b>Joint Pinnacle and Heritage Presentation Introduction by Mike Owens – Ken Byers <i>Forum 400, MDRT</i></b>
<b>11:30 to 12:15 p.m.</b>	<b>Joint Pinnacle and Heritage Presentation Texas Department of Insurance Nicole Thornbro – <i>Fraud and Current Issues</i></b>
<b>12:15 p.m.</b>	<b>Golfers Get Box Lunches and Depart Non-golfers – Free Time: Tours, etc.</b>
<b>1:55 p.m.</b>	<b>Golf at J.W. Marriott – Oaks Course Tee Times Start at 1:55 p.m. – 7 Minute Intervals</b>
<b>7:20 p.m.</b>	<b>Depart on Bus to La Margarita Restaurant</b>



**February 18 – 22, 2015**

**Mokara Hotel**

**San Antonio, Texas**

## **Meeting Agenda**

### **Friday, February 20, 2015**

**7:00 a.m. to 7:30 a.m.**

**Breakfast Buffet**

**7:30 a.m. to 8:10 a.m.**

**Columbus Life - Steve Sanders**

**8:10 a.m. to 8:50 a.m.**

**Nationwide Insurance - Jesse Allen  
*LTC Opportunities in the Multi-Life Market***

**8:50 a.m. to 9:30 a.m.**

**Principle Insurance – Mark Householder  
*Business Succession Use of the Principle Product***

**9:30 a.m. to 9:40 a.m.**

**BREAK**

**9:40 a.m. to 10:10 a.m.**

**Ohio National Updates - Pam Kalkoff**

**10:10 a.m. to 11:10 a.m.**

**Captive One – Brad Barros  
*Captive Insurance***

**11:10 a.m. to 11:50 a.m.**

**Inland REIT – Carl Plikus and  
Greg Lehrmann  
*A Perfect Storm***

**11:50 a.m. to 12:30 p.m.**

**Transamerica Annuities  
Jim Franklin and Chris McGovern  
*Annuities in the Advanced Market Space***

**12:30 p.m.**

**Golfers Get Box Lunches and Depart  
Non-golfers – Free Time: Tours, etc.**

**1:10 p.m.**

**Golf at The Quarry – 10 Minute Intervals**

**6:20 p.m.**

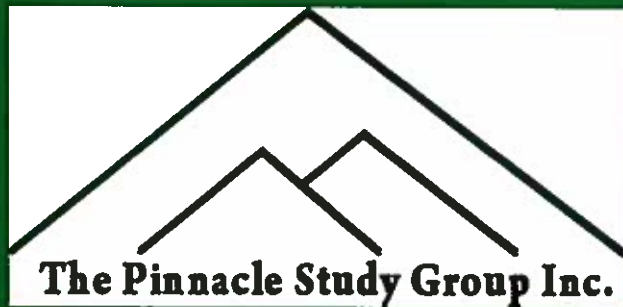
**Depart on Bus to Dinner**

**6:30 p.m. to 9:00 p.m.**

**Dinner at Chart House – Tower**

**9:05 p.m.**

**Bus Back to Hotel**



**February 18 – 22, 2015**

**Mokara Hotel**

**San Antonio, Texas**

## **Meeting Agenda**

### **Saturday, February 21, 2015**

**7:00 a.m. to 7:30 a.m.**

**Breakfast Buffet**

**7:30 a.m. to 9:00 a.m.**

**Closed Business Meeting – Members Only  
Agenda to Be Determined  
Jim Forbls, President**

**9:00 a.m. to 9:30 a.m.**

**Roth IRA PLR Experience in 2014  
Kevin Morse**

**9:30 a.m. to 9:45 a.m.**

**BREAK**

**9:45 a.m. to 10:30 a.m.**

**Advanced Markets  
Highland Capital – David Bernaus  
and Ted Gibbons**

**10:30 a.m. to 11:15 a.m.**

**Introduction Perspective Member  
Mark Prowell**

**11:15 a.m. to 11:45 a.m.**

**Dan Danese and Mike Owens  
FSI Update/FSI Benefits**

**12:00 p.m. to 12:15 p.m.**

**President Call Meeting to Close**

**12:15 p.m.**

**Golfers get box lunches and depart  
Non-golfers – Free Time: Tours, etc.**

**1: 27 p.m.**

**Golf at La Cantera Resort. – 9 Minute  
Intervals**

**6:20 p.m.**

**Meet in Lobby to Depart on Bus to  
San Antonio Stock Show and Rodeo (Show  
Starts at 7:30 p.m.) – Dinner on Your Own  
Bus Back to Mokara Hotel**

**9:05 p.m.**

### **Sunday, February 22, 2015**

**Guests Depart Hotel**