



**THE PINNACLE STUDY GROUP, INC.**

**AGENDA**

**February 17-21, 2010  
Amelia Island, Florida**

**Wednesday, February 17th**

- |                       |   |
|-----------------------|---|
| 9:00 a.m. – 5:00 p.m. | Arrival and check in at<br><b>The Ritz Carlton Amelia Island</b><br>4750 Amelia Island Parkway<br>Amelia Island, FL 32034       |
| 9:00 a.m. – 5:30 p.m. | Golf and Fishing at members' expense  |
| 6:00 p.m.             | Depart from The Ritz Carlton for dinner at<br><b>The Marina Seafood Restaurant</b><br>101 Centre Street<br>Fernandina Beach, FL |
| 6:30 p.m.-9:30 p.m.   | Cocktails with dinner to follow   |

*\*For those going straight to The Marina Seafood Restaurant from leisure activities or late arrivals, there is public parking across the street from the restaurant.*



## Thursday, February 18th

- 6:30 a.m. – 7:30 a.m. Breakfast and Welcome from host, **Jim Forbis, CLU, ChFC, CSA, AIF**  
Housekeeping Items  
Introduction of Dan Danese, CFP, CLU & Irwin Zagoria, Provisional Members
- 7:30 a.m. – 8:30 a.m. **Dan Danese, CFP, CLU, President Legacy Solutions, Inc.**  
**Irwin Zagoria, President, IMZ Financial Services Corporation**
- 8:30 a.m. – 9:30 a.m. **Matt Ferreri, Regional Sales Vice President, MetLife**  
*MetLife Investors' Total Protection Strategy for Today's Rollover Market*  
**Kimble Skov, Account Manager, Pimco**  
*Investing in the New Normal*
- 9:30 a.m. – 10:00 a.m. **Grant Foster, CLU, ChFC, AEP**  
*Promises Made Promises Kept, Death Claims that Made a Difference*
- 10:00 a.m. – 10:15 a.m. Break
- 10:15 a.m. – 12:00 a.m. **Matt Lynch, President & CEO of Capital Analysts Incorporated**  
**Tom Giachetti, Esq., Stark & Stark Attorneys at Law**  
*Structuring an Internal or External Sale: Legal Agreements & Due Diligence*  
Q&A Included
- 12:00 a.m. – 1:00 p.m. Lunch
- 1:30 p.m. – 5:30 p.m. Golf at **Amelia River Golf Course** or other leisure activity
- 6:30 p.m. Depart from The Ritz Carlton for dinner at  
**Le Clos Café-Restaurant Provencal**  
**20 South Second Street**  
**Amelia Island, FL**
- 7:00p.m. - 10:00 p.m. Cocktails with dinner to follow



## Friday, February 19th

6:30 a.m. – 7:30 a.m.	Breakfast
7:30 a.m. – 7:45 a.m.	Housekeeping Items
7:45 a.m. – 8:30 a.m.	<b>Mark Teitelbaum, Vice President, Advanced Markets, Axa Distributors</b> <i>Issues Surrounding Employer Owned Life Insurance</i>
8:30 a.m. – 9:00 a.m.	<b>Pam Kalkhoff, CLU, Regional Marketing Director, Columbus Life</b> <i>Columbus Life 2010 – What's New</i>
9:00 a.m. – 9:30 a.m.	<b>Steve Reese, Regional Vice President, John Hancock Annuities</b> <i>Great Expectations</i>
9:30 a.m. – 9:45 a.m.	Break
9:45 a.m. – 10:30 a.m.	<b>Tom Commito, JD, LL.M, CLU, ChFC, Director Sales Concepts, Lincoln</b> <i>Roth IRA Conversions</i>
10:30 a.m. – 11:00 a.m.	<b>Ed Thauer, CLU, LIC, ChFC</b> <i>LEAP/Wealth in Motion Software Case</i>
11:00 p.m. – 12:00 p.m.	<b>Paul Pistilli, CFP, CLU, ChFC, Managing Principal, Mid-Atlantic Highland Capital</b> <i>Navigating the Process... From Plan, to Product, to Placement...</i>
12:30 p.m. - 1:30 p.m.	Lunch
1:30 p.m. – 5:00 p.m.	Golf at <b>Amelia National Golf Club</b> or other leisure activity
2:30 p.m.	<b>Ladies:</b> Depart from The Ritz Carlton for Wine Tasting at <b>Intercoastal Wine Company</b>
6:00. p.m.	Dinner on Own



## Saturday, February 20<sup>th</sup>

6:30 a.m. – 7:30 a.m.	Breakfast
7:30 a.m. – 8:00 a.m.	Housekeeping Items
8:00 a.m. – 8:45 a.m.	<b>Micki Hoesly, CLU, ChFC, President, Resource One Financial Advisors</b> <i>Winning Strategies for Investing in Mutual Funds</i>
8:45 a.m. – 9:30 a.m.	<b>Buzz Hankinson, CLU, ChFC, Hankinson Wealth Management, Inc.</b> <i>Sales Ideas and People Skills that Will Make You Millions</i>
9:30 a.m. – 9:45 a.m.	Break
9:45 a.m. – 10:30 a.m.	<b>Ben Stewart, Regional Sales Director, Midland National Life</b> <b>Jerry Blair, Senior Vice President, Midland National Life</b> <b>Patrick Bowen, Sales Vice President, Midland National Life</b> <i>An Enduring Partnership</i>
10:30 a.m. – 11:00 a.m.	<b>Dick Herrick, CLU, ChFC</b> <i>Experiences and Relationships Are What Make Us Unique</i>
11:00 a.m. – 11:30	<b>Gregg Beemer</b> <i>Good Old Fashioned Insurance</i>
11:30 a.m. – 12:00 p.m.	Pinnacle Business Meeting
12:00 p.m. – 1:00 p.m.	Lunch
1:00 p.m. – 5:00 p.m.	Golf at <b>The Ritz Carlton</b> or other leisure activity
6:30 p.m. – 9:30 p.m.	Dinner at <b>The Ritz Carlton's Salt Restaurant</b>



Sunday, February 21<sup>st</sup>

Departures and Free Time