

**John S. Clarke**

February 22, 2007

To My Pinnacle Friends,

Welcome to Colorado and Keystone!

I hope your stay is meaningful, enjoyable, and valuable to your careers.

As you know, the activities here are many! Whatever you choose to do, remember you are at 9,000 to 11,500 feet above sea level so make the pace slower.

I've enclosed a gift of a DVD titled "The Secret". Its message is positive and can be applied to all ages and walks of life. I hope you benefit through viewing it.

Thank you.

Sincerely,



**The Pinnacle  
Study Group, Inc.**

Attendees

Mitch and Sara Arnold.

Larry and Jane Baker

Greg Beemer

Russ Bishop

John Clarke

Larry and Judy Clayton

Jim Forbis

All Gibbons

Dick and Marianne Herrick

Ed and Karen Thauer

Jim Laurent

Wayne Minich

Don and Anne Moore

Mike Owens

Guy Swain

Tim and Nancy Reis

Bob Wright

## Final Pinnacle Agenda

### Wednesday February 21<sup>st</sup>

Afternoon each member check in at the Condominium Registration Building

6:00 Dinner at the Edgewater Café in the Lodge Building

### Thursday February 22<sup>nd</sup> – Keystone Conference Center

Breakfast in your condo.

8:00 to 8:15 Welcome John Clarke

8:15 to 9:00 “Future of the Life Insurance and Financial Service Industry” Mark Wilkerson, Senior V.P. and CMO, Columbus Life

9:00 to 10:00 “State of the Investment World and Comments on Portfolio Structure” Chris Surrichio, Asst V.P. of Research, Capital Analysts Inc.

10:00 to 10:15 Break

10:15 to 12:00 “Legacy Planning” Tom Atkins, V.P. Regional Consultant, Assetmark

12:00 Lunch in condos

Afternoon Various Activities

6:30 Dinner – Der Fondue at the Outback Lodge at the top of the mountain

### Friday February 23<sup>rd</sup> – Keystone Conference Center

Breakfast in your condo.

8:00 to 8:45 “Products, Services, Opportunities with ING” John Morrill, Sales V.P., ING

8:45 to 9:15 “The Pursuit of Happiness, Restful Sleep, and Predictable, Sustainable and Potentially Increasing Income for Your Retirement Clients – and You” Mike Treske, President, John Hancock Variable Annuity Co.

9:15 to 9:30	Break
9:30 to 10:30	"Questions Great Financial Advisors Ask" by Alan Parisse
10:30 to 10:45	Break
10:45	"Change" by Alan Parisse (This session is open for spouses)
Afternoon	Various Activities
5:45	Dinner – Ski Tip Ranch

Saturday February 24<sup>th</sup> – Keystone Conference Center

Breakfast in your condo

Case Studies

8:00 to 8:30	Mitch Arnold – "Variable Annuities, My Way"
8:30 to 9:00	Gregg Beemer – "Life Settlements...Product Planning for Client Focused Advisors and Broker Dealers"
9:00 to 9:15	Break
9:15 to 9:45	John Clarke – "A Life Insurance Rescue Tale"
9:45 to 10:15	Jim Forbis – "Business Continuity Planning One Step at a Time"
10:15 to 10:45	Al Gibbons – "The Process is the Product"
10:45 to 11:00	Break
11:00 to 11:45	Bob Wright – "Two Meaningful Cases"
11:45 to 12:15	Business Meeting
12:15	Lunch at Conference Center
Adjourn:	Those staying over, check in at Quality Suites, Evergreen CO.
5:00	Dinner at John Clarke's home