



February 16th – 18th, 2006

Raleigh, NC

Thursday, February 16, 2006

- 9:00 a.m. – 5:00 p.m. Arrival and Check in at:
Hilton Raleigh Durham Airport at Research Triangle Park
4810 Old Page Rd., Durham, NC 27703
(919) 941-6000
Guy Swain, Jill Redden – How we use Morningstar, MoneyGuide Pro, Forefield Advisor, and Pareto Systems.
- 6:30 p.m. Dinner – ***Capital City Chop House***

Friday, February 17, 2006

- 7:00 – 7:45 a.m. Breakfast
- 7:45 – 8:00 a.m. Welcome, “The Future Ain’t What It Used To Be”
Guy Swain
- 8:00 – 9:00 a.m. “Discussion of Non-Correlated Investments”
Jed Koenigsberg, Vice President
PIMCO/Allianz Global Investors
- 9:00 – 10:15 a.m. “The Accelerated Advocacy Process, Part 1”
Dennis Mosely - Williams
Pareto Systems
- 10:15 – 10:30 a.m. Break
- 10:30 – 12:00 p.m. “The Accelerated Advocacy Process, Part 2”
Dennis Mosely - Williams
Pareto Systems
- 12:00 – 1:00 p.m. Lunch
- 1:00 – 2:00 p.m. ***Nationwide Advisory Services***

2:00 – 2:45 p.m. “Fundamentals of Office Real Estate”
Terry Eskind, Regional Sales Director
Hines Real Estate Securities, Inc.

2:45 – 3:00 p.m. Break

3:00 – 4:00 p.m. “Heads You Win Tails You Lose”
Tom Atkins, Vice President
AssetMark

4:00 – 5:30 p.m. “Life Insurance in the Secondary Market”
Jerry Pintarich, MBA, Assistant Vice President
Columbus Life Insurance Company

6:30 p.m. Dinner – **Ruth’s Chris Steak House**

Saturday, February 18, 2006

7:00 – 7:45 a.m. Breakfast

7:45 – 8:15 a.m. “The Pyramid of Persuasion - The Process of Choosing an Annuity Partner”
Dave Consolino, Regional Vice President
John Hancock Wood Logan

8:15 – 9:45 a.m. “Investing with Variable Annuities”
John Huggard, JD, CFP®, CLU, ChFC

9:45 – 10:00 a.m. Break

10:00 – 11:30 a.m. “Annuity Sales Techniques Used by Multi-Million Dollar Producers”
John Huggard, JD, CFP®, CLU, ChFC

11:30 – 12:15 p.m. Pinnacle Business Meeting

12:15 – 1:00 p.m. Lunch

1:30 – 3:30 p.m. Tour of Research Triangle Park

6:00 p.m. Cocktails and Dinner – **Guy’s House**