



MEMBERSHIP APPLICATION

Phone: 888-394-2442

Fax: 402-434-2450

Vision: To be the most dynamic and premier member study group organization

Member Requirements:

In addition to the production qualifications and other requirements outlined in this application, each member is required to:

- Willingly and openly share ideas
- Believe that their future is bigger than their past
- Believe that they have the ability to make a difference in the lives of the people they serve
- Strive to be a “game changer”
- Abide by the Pinnacle Study Group Inc. bylaws and philosophies

Membership Process:

All prospects must turn in the following items for their application to be considered complete:

- 2018 Membership Application (all required fields completed)
- + Two (2) letters of reference

Once your application is complete, your information will be submitted to the Pinnacle Study Group Inc. Membership Committee for initial approval. The Membership Committee reviews your application and then determines if it will be submitted to the Pinnacle Group membership for comment. Any comments will be reviewed by the Membership Committee, and a decision regarding invitation to the next meeting will be made at that time. This process takes approximately two weeks from the time your application is deemed complete.

ALL FIELDS ARE REQUIRED UNLESS OTHERWISE MARKED PLEASE PRINT CLEARLY

FULL NAME AND DESIGNATIONS:

INFORMAL NAME:

SPOUSE NAME (OPTIONAL):

COMPANY NAME:

STREET ADDRESS:

ADDITIONAL ADDRESS:

CITY/STATE/ZIP :

TELEPHONE:

FAX:

E-MAIL:

WEB SITE:

DATE OF BIRTH:

YEARS IN BUSINESS:

PRODUCER GROUP (IF APPLICABLE):

PROFILE

- A. Your primary role:
- B. Describe in detail your primary market and how you strive to bring value to them:

Please indicate, in increments of 10%, the percentage of the following areas of practice:

Areas of Market Focus:	Wealth Transfer	Executive Benefits	Employee Benefits	Financial Planning	Investment Management	Other (Define Below)	Total
	%	%	%	%	%	%	=100%

Other Area of Market Focus (please specify): _____

What is your firm's product mix?	Life	Annuities	Long Term Care	Disability	Life Settlements	Investments	Corporate Benefits (e.g., Group Health, etc.)	Other (Define Below)	Total
	%	%	%	%	%	%	%	%	= 100%

Other Product in the mix (please specify): _____

Any other comments?

If asked to present at our next meeting, what would your topic be?

C. 2011 Organizational and Industry Affiliations/Participation (Please circle ALL that *apply*):

Association for Advanced Life Underwriting (MLU)
The American College
Financial Planning Association (FPA)
Heckerling Institute
National Association of Insurance and Financial
Advisors (NAIFA)
Society of Financial Service Professionals (SFSP)
American Bar Association (ABA)
Estate Planning Council (EPC)
General Agents and Managers Association (GAMA)

Life and Health Insurance Foundation for Education
Forum 400
MDRT
Court of the Table (COT)
Top of the Table (TOT)
Other (please specify)

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significant changes in the marketplace do you see occurring in the next 3 years?

D. References

Two references are required.

The reference should answer the following questions: Why would the applicant be a good member?
How long have you known the applicant? How do you know the applicant?

Do you know any members of The Pinnacle Study Group? (IF so, please list their names)

E. There are three ways to submit:

1) By having your reference faxed to 402-434-2450

2) By having your reference faxed or emailed to any of our members listed at our website www.pinnaclestudygroup.com

3) By having the references mailed to 875 South 48th Street, Lincoln, NE 68510



**Please go to our website www.pinnaclestudygroup.com
For information about our by-laws, our philosophy, copies
of the agenda from previous meetings, our current
membership roster, etc.**