



2019 Pinnacle Study Group & Cornerstone Study Group Summer Meeting in Raleigh, NC

8/14/2019

Wednesday

Agenda

12:00-1:00	Lunch
1:00-1:10	Welcome
1:10-1:55	Presenter - Kyle Campbell, Live Oak Bank: Acquiring a Practice in a Competitive Market
2:00-2:50	Presenter - Pat Scanlon, Global Atlantic: Masters of Growth
2:50-3:00	Break
3:00-3:50	Presenter - Ted Cox, City National Rochdale
3:50-4:00	Break
4:00-4:50	Presenter - Wayne Bloom, CEO of Commonwealth Financial Network: Industry Trends and the Future for Advisors
6:30-9:00	Dinner - Mia Francesca at North Hills

8/15/2019

Thursday

Agenda

7:15-8:00	Breakfast & Presenter - Teri Pampaloni, Prudential
8:00-8:50	Presenter - Jason Brown, Prudential and Patrick Creegan, Blackrock
8:50-9:00	Break
9:00-9:50	Presenter - Jim Hickey, John Hancock: Generational Intelligence to Build a Sustainable and Growing Practice
9:50-10:00	Break
10:00-10:50	Presenter - Alex Dryden, JP Morgan: A Guide to the Markets
10:50-11:00	Break
11:00-11:50	Lunch & Presenter - Mike Lynch, Hartford, MIT Age Lab
12:00	Depart for NC State – tee time at 12:30 PM
1:30	Depart for American Tobacco Campus Tour
6:00-9:00	Cocktails & heavy hors d'oeuvres reception Renaissance Hotel



8/16/2019

Friday

Agenda

7:15-8:00	Breakfast
8:00-8:50	Presenter - Dave Gordon, Eaton Vance: Advisor Institute
8:50-9:00	Break
9:00-9:25	Presenter - PSG – David M. Muilenberg
9:25-9:50	Presenter - PSG - Don Moore
9:50-10:00	Break
10:00-10:50	Presenter - Mark E. Buehner, Lincoln Moneyguard: Long-Term Care Trends and Product Options
11:00-11:30	Fast and Furious
11:30-1:00	Business Meeting and Lunch
1:00	Adjourn and Departure

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