

MEMBERSHIP APPLICATION

Phone: 501-605-8002 | Fax: 501-605-8011

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 can 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:

- 2021 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 DESIGNATION: _____

INFORMAL NAME: _____

SPOUSE NAME (OPTIONAL): _____

COMPANY NAME: _____

STREET ADDRESS: _____

ADDITIONAL ADDRESS: _____

CITY/STATE/ZIP: _____

TELEPHONE: () _____

FAX: () _____

E-MAIL: _____

WEBSITE: _____

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	Investments 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?

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

C. 2021 Organizational and Industry Affiliations/Participation (Please check ALL that apply):

- | | |
|---|---|
| <input type="checkbox"/> Association of Advanced Life Underwriting (MLU) | <input type="checkbox"/> Estate Planning Council (EPC) |
| <input type="checkbox"/> The American College | <input type="checkbox"/> General Agents and Managers Association (GAMA) |
| <input type="checkbox"/> Financial Planning Association (FPA) | <input type="checkbox"/> Life and Health Insurance Foundation for Education (Forum 400) |
| <input type="checkbox"/> Heckerling Institute | <input type="checkbox"/> Million Dollar Round Table (MDRT) |
| <input type="checkbox"/> National Association of Insurance and Financial Advisors (NAIFA) | <input type="checkbox"/> Court of the Table (COT) |
| <input type="checkbox"/> Society of Financial Service Professionals (SFSP) | <input type="checkbox"/> Top of the Table (TOT) |
| <input type="checkbox"/> American Bar Association (ABA) | <input type="checkbox"/> Other (please specify) |

References: (Two letters of reference are required)

The referee should answer the following questions:

1. Why would the applicant be a good member?
2. How long have you known the applicant?
3. How do you know the applicant?
4. Do you know any members of The Pinnacle Study Group? (If so, please list their names)

There are three ways to submit application and/or letters of reference:

1. Fax to 501-605-8011
2. Fax or E-mail to any of our members listed on our website (www.pinnaclestudygroup.com)
3. Mailing to 200 Westport Drive, Ste A, Cabot, AR 72023

Please go to our website www.PinnacleStudyGroup.com for information about our philosophy, copies of the agenda from previous meetings, our current membership roster, etc.