PEAK Advisor Event

May 12-13, 2025

3340 Peachtree Rd NE
Suite 2300, Atlanta, GA

TARKENTON FINANCIAL
Solutions for Retirement

Monday, May 12

- **By 2:00 PM - Arrival to Atlanta**
  - Car service for advisors from Atlanta airport to Grand Hyatt Buckhead
  - Hotel check-in @ 3:00 PM (early check-in may be available, not guaranteed)
- **5:00 PM - Cocktail Hour with NFL Hall of Famer Fran Tarkenton**
  - The Tarkenton Residence, Atlanta, GA
- **7:00 PM - Atlanta Braves vs. Washington Nationals**
  - Truist Park Private Suite, dinner, open bar

Tuesday, May 13

- **8:30 AM - Welcome/Introductions/Breakfast**
  Matt Tarkenton, President & Fran Tarkenton, Founder
- **9:00 AM - Reach Your PEAK in Marketing**
  Jay Moore, Director of Marketing
  - More prospects, less cost! Discover Retire Ready
  - Why You Have to Be Using Video in Your Marketing
  - Taking Ownership of Your Story to Grow Your Business
  - Success in All Phases of the Marketing Game: How to use multiple marketing channels effectively
- **10:00 AM - Partner Spotlight: Lincoln Financial Group**
  Matt Wunderlich, Regional Director, Annuity Solutions, Lincoln Financial
  - Take a fresh look at trigger strategies to unlock more growth potential!
- **10:30 AM - FIA Tools, Resources, and Strategies**
  Amanda Adams, Director of Sales
  - Guaranteed Income + Accumulation Potential: Game Changer for Your Clients' Retirement
  - The Planning Tool that Sells Annuities for You
  - Lock It In: Protect Your Clients' Upside with Index Lock & Locked Caps
  - Replacements: No Longer a Dirty Word
  - Taking a Second Look at FIAs: How to Grow your Advisory Practice
  - Annuity FIA Payout vs 4% Rule
  - The Power of an On-Call Advanced Markets Expert

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Tuesday, May 13, continued

- **11:15 AM - Elite Advisor Spotlight: How TF helps me add services, add value, and add revenue**
  Bryan Waites and Ali Waites, Waites Financial Services
  - How I Quadrupled My Revenue in the Last 5 years
  - Simple Technique I Use in Every Client Meeting to Unlock More Life Insurance Opportunities
  - Why Tarkenton's Retire Ready Workshops are the Lifeblood of My Practice
  - Simple and Effective Ways to Introduce Premium Finance to the Client conversation
  - Key Questions I Ask in Every First Appointment
  - Building Credibility in Your Community to Gain More Clients
  - Don't Fall at the Finish Line: How to Convert Workshop Attendees into Appointments On Your Calendar
  - Teams Win, Individuals Don't: How to Build Your Team for Success
- **12:00 PM - Lunch**
- **12:45 PM - Unlocking Powerful Life Insurance Strategies and Opportunities**
  Tyler Schmidt, Director of Life Insurance and Dan Wachs, CLU, ChFC, Perpetual Wealth Management
  - Perpetual Wealth System: Your turnkey offering for engaging more high net worth clients and business owners
  - The Dedicated Team that Makes Premium Financing Easy
  - Power of Partnership: Patrick Kelly, Simplicity Life and KaiZen
  - The New IUL Product that You Didn't Know Your Clients Needed
  - Turnkey Resources, Tools, & Marketing to Help You Close More Life Cases
- **1:45 PM - Closing Remarks, Next Steps, and Departures**
  - Please plan your flight to depart no earlier than 5:00 PM if possible
  - Car service for advisors to Atlanta airport

This special event is for qualified advisors only!
All expenses paid including 1-night hotel accommodations at Grand Hyatt Buckhead, car service, and airfare reimbursement up to $750.

Learn more and request your spot at:
www.TarkentonAcademy.com