



PEAK Advisor Event

September 22-23, 2025

3340 Peachtree Rd NE
Suite 2300, Atlanta, GA

TARKENTONFINANCIAL
Solutions for Retirement

Monday, September 22

- **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 - Welcome & Cocktail Hour with NFL Hall of Famer Fran Tarkenton**

- The Tarkenton Residence, Atlanta, GA

- **7:15 PM - Atlanta Braves vs. Washington Nationals**

- Truist Park Private Suite, dinner, open bar

Tuesday, September 23

- **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: Top Annuity Carrier**

- Get actionable product insights and sales strategies from one of our top carrier partners to help you write more FIAs!

- **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*