



TARKENTONFINANCIAL
Solutions for Retirement

PEAK ADVISOR ACADEMY

September 23, 2024 | Atlanta, GA

SUNDAY, SEPTEMBER 22

AFTERNOON

Flight Arrivals to Atlanta

Car service provided from ATL airport to Grand Hyatt Hotel in Buckhead (3300 Peachtree Rd NE, Atlanta, GA 30305), short 3-minute walk from TF offices

EVENING

At Leisure

MONDAY, SEPTEMBER 23

11:30AM

Welcome to Tarkenton Financial

Fran Tarkenton, *Founder & CEO, NFL Hall-of-Famer*
Matt Tarkenton, *President*

12:00PM

Lunch

Guaranteed Income + Accumulation Potential: Game Changer for Your Clients' Retirement

Amanda Adams, VP of Sales & the TF Annuity Sales VPs

- 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
- The Best Way to Position Accumulation Potential
- The Best Way to Position Guaranteed Income
- 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

12:40PM

The Hidden Costs of Cash

How to overcome the long-term side effects of holding onto too much cash

Stephen J Pandullo, CFP®, RICP®, WMCP®, ChFC®, CEPA®

Vice President, Relationship Management IMO Channel, Athene USA

1:00PM

Take your Marketing and Branding to the Next Level

Jay Moore, Marketing Director

Savana Sebastian, Marketing Associate

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MONDAY CONTINUED

1:00PM

Take your Marketing and Branding to the Next Level

- Why You Have to Be Using Video in Your Marketing
- Are Retirement Workshops Dead?
- Taking Ownership of Your Story to Grow Your Business
- Don't be a One-Trick Pony: How to use multiple marketing channels effectively
 - Workshops, webinars, client events, social media/video

2:00PM

Elite Advisor Spotlight: My Dream Team

Dr. Larry Sasso, Sasso Insurance & Financial Services, Inc.

- The Marketing Video that Got Me New Annuity Premium
- Unlocking More New Business Through Existing Clients
- How Partnering with a Hall-of-Famer has Changed my Business
- Building Credibility in Your Community
- Key Questions I Ask in Every First Appointment
- Teams win individuals don't: How to Build Your Team for Success

2:30PM

Elite Advisor Spotlight: How TF helps me add services, add value, and add revenue

Bryan 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 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

3:00PM

The Perpetual Wealth System: Your turnkey system for attracting more high net worth clients

Dan Wachs, CFP, CLU, ChFC, Perpetual Wealth Management
Tyler Schmidt, Director of Life Insurance

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MONDAY CONTINUED

3:00PM	<ul style="list-style-type: none">• The Truth About IUL vs 401k• Why You're Missing Out on Business Owner Marketing Opportunities• The Dedicated Team that Makes Premium Financing Easy• The New IUL Product that You Didn't Know Your Clients Needed• Turnkey Resources to Help You Market Life Insurance More Effectively
4:00PM	Break Take some time to catch up on the day before we reconvene for the evening's festivities
5:00PM	Happy Hour with Fran and the Team at the home of Fran & Linda Tarkenton Rub elbows with the Hall-of-Famer himself as you unwind from a long day and tour some of Fran's most cherished football memorabilia
7:00PM	The Painted Pin Let's unwind and relax as we get to know each other better with food drinks and a fun bowling and games experience

TUESDAY, SEPTEMBER 24

MORNING	Departure Car service provided from Grand Hyatt Hotel in Buckhead to ATL airport
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3340 PEACHTREE RD NE SUITE 2300, ATLANTA, GA 30326

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