



# 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*  
**(continued on next page)**



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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: 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

2:30PM

**Elite Advisor Spotlight: How I position annuities with accumulation-minded clients**

*Morris Nutt, Trinity Capital Management*

- How I Navigate Conversations with Clients to Find Out What They Really Want from Retirement
- Why Giving Back to Your Community Gives Back to You
- Long Term Care Strategies with Clients
- Cultivating Your Brand to Capture Your Market
- Tell Your Story, Relate to Your Clients, Grow Your Production
- How I Use Annuities as a Hedge
- Networking Tips that Actually Work

3:00PM

**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



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## MONDAY CONTINUED

3:30PM	<p><b>The Perpetual Wealth System: Your turnkey system for attracting more high net worth clients</b>  <i>Dan Wachs, CFP, CLU, ChFC, Perpetual Wealth Management</i>  <i>Tyler Schmidt, Director of Life Insurance</i></p> <ul style="list-style-type: none"> <li>• The Truth About IUL vs 401k</li> <li>• Why You're Missing Out on Business Owner Marketing Opportunities</li> <li>• The Dedicated Team that Makes Premium Financing Easy</li> <li>• The New IUL Product that You Didn't Know Your Clients Needed</li> <li>• Turnkey Resources to Help You Market Life Insurance More Effectively</li> </ul>
4:00PM	<p><b>Break</b>          Take some time to catch up on the day before we reconvene for the evening's festivities</p>
5:00PM	<p><b>Happy Hour with Fran and the Team at the home of Fran &amp; Linda Tarkenton</b>          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</p>
7:00PM	<p><b>The Painted Pin</b>          Let's unwind and relax as we get to know each other better with food drinks and a fun bowling and games experience</p>

## TUESDAY, SEPTEMBER 24

MORNING	<p><b>Departure</b>          Car service provided from Grand Hyatt Hotel in Buckhead to ATL airport</p>
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