PEAK PRO
FINANCIAL

WELCOME TO THE
REST OF YOUR CAREER.

ADVANCED MARKET PLANNING

TURN UP PRODUCTION. DOMINATE YOUR MARKETPLACE.

AMP™
ADVANCED MARKET PLANNING

EVENT DETAILS

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WHAT

Two days of advanced case design and sales training to help transform your practice

WHEN

January 9-10, 2020

WHERE

7979 E Tufts Ave
Denver, CO 80237

Searching for smarter ways to amplify production and stand out from the crowd?

We've got you covered.
Welcome to Advanced Market Planning (AMP™).

Designed for our most dedicated advisors, AMP is more than a complimentary training session. It's an experience like no other, giving you exclusive access to our unique turnkey systems and team of agent development experts, as well as today's top industry thought leaders. You'll gain fresh insights to differentiate your practice and take production to new heights as we dig into a range of topics, such as:

- **IUL sales mastery** – Learn the art of becoming the ultimate IUL authority with real-world examples and proven techniques to overcome objections
- **Hidden opportunities in our industry** – Leverage explosive insights and proprietary tools to help maximize sales and address your clients' biggest concerns
- **Breaking the indexed investing conundrum** – Cut through the clutter with expert tactics to help you find the right solution so you aren't leaving anything on the table

For over 15 years, we have personally tested and perfected our proprietary sales systems to help advisors like you elevate their practice—and turn their six-digit annual paycheck into an income of $3,000,000 or even more.

Become the go-to expert in your market

If you're serious about turning up production and leveraging innovative strategies to better serve your clients, **call your Sales Development Advisor at 866.866.7050** or **save your spot here.**

TENTATIVE AGENDA*

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We know that your time is precious, so let's make the most of it. We designed an action-packed training program to ensure you get everything you need in the most efficient way possible. Please plan to attend all sessions so you don't miss key intel that is critical to your success.

DAY ONE

TIME	SESSION
8:00-8:30 A.M.	BREAKFAST
8:30-8:45	INTRODUCTIONS
8:45-9:45	IUL SALES MASTERY
9:45-10:00	BREAK
10:00-11:00	LEVERAGING AG 49 AS A SALES TOOL
11:00 A.M.-12:00 P.M.	CONCEPTS IN ACTION: CASE STUDIES
12:00-1:00	LUNCH
1:00-1:30	SAYBRUS PARTNERS PRESENTATION BY: BIFF BAKER
1:30-2:00	GOLDMAN SACHS PRESENTATION BY: JEREMY EISENSTEIN TAO WEN
2:00-2:45	CHASING WHALES: SPLIT-DOLLAR STRATEGIES
2:45-3:00	BREAK
3:00-3:45	PIVOT AND PERSEVERE: A REAL-LIFE EXAMPLE
3:45-4:30	THE BUCKET PLANNING BLUEPRINT
5:30-8:00 P.M.	DINNER (OPTIONAL)

**Agenda topics and times subject to change*

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TENTATIVE AGENDA*

DAY TWO

TIME	SESSION
8:00-8:30 A.M.	BREAKFAST
8:30-9:15	HIDDEN OPPORTUNITIES GLOBAL ATLANTIC PRESENTATION BY: ERIC THIBAULT
9:15-11:00	THE NEW I.R.A.® NORTHSTAR FUNDING PARTNERS PRESENTATION BY: DALE HUMPHREY
11:00-11:15	BREAK
11:15 A.M.-12:00 P.M.	SIMPLIFYING THE SALES PROCESS
12:00-12:30	LUNCH
12:30-1:15	INDEXED INVESTING: BREAKING THE CONUNDRUM A CONVERSATION WITH JAMES HAHN, ANNEXUS
1:15-1:45	MARKETING MATTERS: POSITIONING IUL
1:45-2:00	BREAK
2:00-2:45 P.M.	THE LTC ADVANTAGE

**Agenda topics and times subject to change*

GUEST SPEAKERS

JEREMY EISENSTEIN

Vice President, Equity Derivatives
Goldman Sachs

Jeremy Eisenstein is a Vice President at Goldman, Sachs & Co. in the Securities Division, based in New York. Within the Equity Derivatives franchise, he is a member of the Insurance Solutions team responsible for coverage of insurance companies with an emphasis on annuity product development.

Prior to his current role, Mr. Eisenstein was a member of the Cross Product Sales team at Credit Suisse in New York from 2014 through 2017 focused on cross-asset distribution of Exchange Traded Notes (ETNs) and Structured Products to Registered Investment Advisors, Family Offices and Broker-Dealers. Jeremy also held prior roles at Barclays Bank/Lehman Brothers from 2005 through 2014. Mr. Eisenstein holds a B.S. in Finance and Management Information Systems from Binghamton University.

TAO WEN

Vice President, Equity Derivatives
Goldman Sachs

Tao Wen is a Vice President on the equity structuring and sales strats team, based in New York. She joined Goldman Sachs in early 2019, focusing on the development and marketing of systematic trading strategies for retail-facing products. Prior to her current role, she was a Vice President at Barclays on the cross-asset structuring team, providing solutions to insurance companies, private banks, broker dealers etc. She holds a B. Econ in Finance and a B.S. in Applied Mathematics from Peking University and a M.S. in Financial Engineering from Columbia University.

GUEST SPEAKERS

W. E. BIFF BAKER

National Sales Manager

Saybrus Partners

Biff Baker is National Sales Manager at Saybrus Partners, LLC, responsible for developing IMO partnerships for life and annuity sales through Nassau Life & Annuity, Atlantic Coast Life and Sentinel Security Life. Biff helps IMOs develop sales by leveraging creative strategies, innovative products and responsive service.

Biff joined Phoenix Life (now Nassau Re) in 1995 as a brokerage consultant. Having seen many changes throughout his more than 30-year career, Biff observes one thing has remained constant: producers and clients expect and deserve high quality service. His goal is to provide the very best service possible while helping producers achieve their clients' estate, business and retirement planning objectives.

Biff's industry involvement includes membership in the Philadelphia Estate Planning Council, NAIFA and NAILBA. He has served as a board member of the National Association of Life Underwriters and the Greater Philadelphia Chapter of the Society of Financial Services Professionals. As a Registered Representative, Biff holds Series 6, 63 and 22 registrations, and is a Chartered Life Underwriter (CLU), a Chartered Financial Consultant (ChFC). He also holds the CERTIFIED FINANCIAL PLANNER™ certification. Biff resides in Upper Gwynedd, PA, with his wife and twin daughters.

ERIC THIBAULT

Regional Vice President

Global Atlantic

Eric Thibault is Regional Vice President for Global Atlantic's Traditional Life business in the West Region. He is responsible for developing and maintaining strong, productive and profitable client relationships with regional core distribution partners. Eric has a deep understanding of the competitive landscape within the life insurance industry and can help explain in plain language the features, benefits and advantages of Global Atlantic's broad portfolio of life insurance products.

Eric has been with Global Atlantic since 2017. He began his career with Prudential Bache Securities, and would later work for Compensation Resource Group and AON Consulting's Executive Benefits Practice. He then joined VOYA Financial as Sales Vice President in the Independent Life Sales division, where he set numerous sales production records and was named Number One Sales Vice President.

Eric maintains FINRA Series 3, 7 and 63 registrations, as well as his life and health licenses. He has been an active community member and volunteer, formerly serving in leadership positions for several non-profit organizations. Eric and his wife, Lidia, live in North Phoenix and have two daughters in college. Eric and Lidia enjoy riding motorcycles in their spare time and are active members of the Harley Owners Group.

DALE HUMPHREY

Chief Marketing Officer

Northstar Funding Partners

Dale Humphrey is the President and Chief Marketing Officer of Northstar Funding Partners (NSFP). NSFP is a specialty firm focused on the design, placement and ongoing administration of life insurance premium finance loans. For over two decades, the company continues to hold its market leading position, providing financed life insurance solutions and unparalleled expertise. NSFP's approach is based on comprehensive sales support, a range of lending partners and cutting-edge technology – all engineered to make our clientele more efficient and effective. When using NSFP, you can have complete confidence that you have delivered the most competitive and carefully designed premium finance loan available.

JAMES HAHN

Executive Vice President

Annexus

James Hahn is Executive Vice President - Life Sales at Annexus. With over 18 years' experience in financial services and sales leadership, James is responsible for growing sales and strengthening IMO and GA relationships. He takes pride in crafting sustainable business ideas that result in increased revenue and powerful value propositions.

James is committed to serving the needs of his community, as he is involved with the Salvation Army and The Gathering Place. He is also a die-hard Nebraska Cornhuskers fan (Go Big Red!).

Intel to crush the marketplace: A sampling of topics*

IUL SALES MASTERY

We're going to dive right into the root of indexed universal life (IUL) and shed light on its history, value proposition and key features. We'll dissect worst case scenarios, sales comparisons and techniques to overcome common objections, giving you the tools you need to become the IUL authority in your marketplace.

LEVERAGING AG 49 AS A SALES TOOL

The IUL space completely changed in March 2016 when the NAIC implemented Actuarial Guideline 49 (AG 49). While the intentions were good, the reality of AG 49 created an overly complicated methodology based on a flawed process. This session will highlight must-have intel on AG 49 and discuss ways you can use the guideline as a powerful sales tool. We'll also share effective techniques to help you educate clients on illustrative rates—so you can proactively address client concerns and mitigate challenging conversations.

THE NEW I.R.A.®

In this session, guest speaker Kim Coulter will introduce the Northstar Funding Partners Insured Retirement Advantage® (I.R.A.®), one of the most innovative financial approaches ever developed. The new I.R.A. is a unique approach to help small business owners obtain life insurance for business protection needs, supplemental income and traditional estate and retirement planning. You'll learn how to expertly apply leverage, breakthrough product solutions and a custom design to significantly boost tax-free income potential and further distinguish yourself from other advisors.

HIDDEN OPPORTUNITIES IN OUR INDUSTRY

Many financial professionals understand the basics of overlooked solutions, but only a handful of them have fully mastered and implemented these strategies in their daily practice. These few advisors have tapped into a major marketplace—further differentiating themselves and their value to clients. Meanwhile, they're catapulting production to heights they never imagined. Get the inside scoop on hidden opportunities in our industry—and leverage our proven blueprint to transform your practice.

INDEXED INVESTING: BREAKING THE CONUNDRUM

Passive investment vehicles like index funds have become wildly popular these days, by some estimates controlling at least half of the U.S. stock market. But with so many index accounts available, how do you cut through the noise and identify the right one to address client needs? And help ensure you aren't leaving money on the table? In this session, we'll simplify the process and break down caps and no-caps, as well as equities versus a multi-asset approach. You'll learn how to fully maximize this methodology as a sales tool to differentiate your practice and become the go-to expert clients seek.

**Topics are subject to change*

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Get your trip reimbursed

PEAK PRO FINANCIAL WILL REIMBURSE YOUR TRIP IF YOU MEET THE FOLLOWING REQUIREMENTS:

- You're contracted with Peak Pro Financial
- You meet a minimum of $100k combined target premium between January 11 and April 11, 2020
- Premium payments and delivery receipts are accepted on or before April 11, 2020
- Flight and hotel accommodation may be available for reimbursement if they meet date requirements*

Make your travel arrangements

For your convenience, here's a list of transportation services and hotels near near the training location. Note that most of the hotels listed provide shuttle service to the training location.

AIRPORT TRANSPORTATION

303 CAR SERVICE
303.515.7010
303carservice@gmail.com

FREEDOM CAB
303.444.4444

SUPER SHUTTLE
800.BLUE.VAN (800.258.3826)
reservations@supershuttle.net

HYATT REGENCY DENVER TECH CENTER (CLOSEST TO TRAINING SITE)
7800 E Tufts Ave
Denver, CO 80237
303.779.1234

DENVER MARRIOTT TECH CENTER
4900 S Syracuse St
Denver, CO 80237
303.779.1100

HILTON GARDEN INN DENVER TECH CENTER
7675 E Union Ave
Denver, CO 80237
303.770.4200

HOTELS

Travel receipts must be submitted to your Sales Development Advisor. Total reimbursement will not exceed $1,000. Hotel reimbursement available for Wednesday, January 8 through Friday, January 10. Airfare reimbursement available for flights taken between Wednesday, January 8 through Sunday, January 12. Dates subject to change.

Your future is on the line

Call your dedicated **Sales Development Advisor at** **866.866.7050** today to learn more about AMP. Or, **save your spot today.**

Seats fill up quickly, so you'll want to act fast!

ABOUT PEAK PRO FINANCIAL

Peak Pro Financial is an innovative agent development firm with the right experience, case design expertise and proprietary solutions you need to stay ahead of an ever-evolving marketplace. Since 2003, we've been devoted to and motivated by the real needs of financial professionals. To learn how we can help you elevate production and better serve your clients, visit us at peakprofinancial.com.

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