



# ADVISORS SUMMIT

Las Vegas, 2016

"New Realities, New Answers"

02/16

## PRELIMINARY AGENDA

### Sunday April 3<sup>th</sup>

6:00 PM Special Presidents Reception / Book Signing with **Bill Harris**  
*1st 50 Registrants*

### Monday April 4<sup>th</sup>

8:00 AM Breakfast

8:30 AM Welcome and Setting the Stage

9:00 AM Welcome – The Advice Industry at a Crossroads  
**Barry Bulakites**, *President and Chief Distribution Officer, Table Bay Financial Network, Inc.*

9:30 AM How will You Evolve Your Value Proposition to Address the Need for Retirement Income  
**Barry Bulakites**, *President and Chief Distribution Officer, Table Bay Financial Network, Inc.*  
**Lance Pelky**, *President, Lance Pelky & Associates, Table Bay 2014 Advisor of the Year*

10:00 AM The # 1 Selling Fixed Index Annuity – *Allianz Preferred*  
**Rich Young**, *RVP Allianz*  
**Dan Biagini**, *Director of Sales*

11:00 Knowledge is power. Having Annuity Swagger is Bliss  
**Bill Harris**, *President W.V. Harris and America's #1 Annuity Trainer and one of America's Most Sought After Speakers*

### **12:00 PM Luncheon**

1:30 PM The 101 Best and Worst Planning Idea's for Your Clients Retirement Plans

2:00 PM Essential IRA Tips for Saving Taxes and Avoiding Penalties  
**Denise Appleby**, *President and Founder, Appleby Retirement Consulting*  
Get the IRA distribution planning expertise that you need to educate clients and unlock retirement assets.  
Don't lose your share of the \$22 trillion retirement market. Learn how our program can turn you into the local IRA expert in your community.

► CONTINUED ON PAGE 2

## Monday April 4<sup>th</sup> (cont'd)

- 4:00 PM Fixed Indexed Annuities – The Power and Protection  
**Jack Marrion**, *President, The Advantage Group*  
Mr. Marrion is the leading expert on Fixed Indexed Annuities in America and consults with leading carriers on product designs. An outspoken and blunt observer of the industry he will discuss recent developments with product designs and the impact that the DOL Fiduciary Standard will have on products, compensation, and how the products are distributed and sold in the future. An incredibly timely and invaluable presentation.
- 4:30 PM The CPA Edge and America's Tax Solutions Program- The # 1 CPA Alliance Program in America  
**Barry Bulakites**, *President and Chief Distribution Officer, Table Bay Financial Network, Inc.*  
**Denise Garrison**, *National Director of CPA Relationships, Table Bay Financial Network, Inc.*  
Ready to end Prospecting forever? The CPA Advantage Edge Program™ is your ticket to create an unending stream of highly qualified and motivated prospects.
- 5:30 PM 15 Sales Ideas in 15 minutes
- 5:45 PM Adjourn

## Tuesday, April 5<sup>th</sup>

- 8:00 AM Breakfast
- 8:30 AM The Bear Naked Truth About Indexed Annuities -  
**Barry Bulakites**, *President and Chief Distribution Officer, Table Bay Financial Network, Inc.*  
**Jorge Villar**, *President and Founder, RME 360*  
Indexed annuity sales are soaring. This extraordinary NEW consumer marketing program will help you explain the benefits of fixed indexed annuities to your prospects and clients like never before
- 9:15 AM Defusing The Long-Term Care Cost Time Bomb – *A Revolutionary Approach*  
Defuse the long-term care cost time bomb and learn what advisors must do to protect their clients. This session explains why the most affluent cannot look to Medicare, Medicaid, the Veterans Administration or the states to bear the increasing cost of long-term care. Learn how advisors can help clients prepare and pay for those costs without threatening their clients' financial plans and jeopardizing their retirement income.
- 10:00 AM The Broker Dealer of the Future  
**Jonathan French**, *President, Crown Capital Securities, L.P.*
- 11:00 AM Athene Annuities – *Back and Stronger than Ever*  
**Steve Pandullo**, *Relationship Manager, Athene USA*
- 12:15 PM **Hosted Luncheon and Top Producers Panel Discussion on Sales Techniques**
- 1:30 PM Tax Efficient Retirement Planning – *An Extraordinary Presentation to Position IUL Sales for Retirement*  
**Joseph Mignogna**, *Director of Advanced Sales, Table Bay Financial Network, Inc.*
- 3:00 PM Accelerate Your Practice with Qualified Plans  
**Steve Smith and Jim Eberhardt**, *Pension Experts, America's Tax Solutions™*
- 3:45 PM Leveraging Technology to Maximize Sales – *Exceptional New Tools to Manage Productivity*  
**Tim Cooper**
- 4:30 PM New Realities, New Answers – ***Making 2016 Your Best Year Ever***