

# PEAK Advisor Event

3340 Peachtree Rd NE  
Suite 2300, Atlanta, GA



## Monday, April 27

- **Arrivals**

- Grand Hyatt Buckhead Atlanta
- Hotel check-in is @ 3:00 PM, arrive at leisure that afternoon or evening

## Tuesday, April 28

- **8:30 AM - Welcome/Introductions/Breakfast**

*Matt Tarkenton, President & Fran Tarkenton, Founder*

- **9:00 AM - Your Marketing Roadmap for 2026**

*Jay Moore, Director of Marketing*

- A proven Retire Ready Event System that fills rooms, builds trust, and drives real client growth
- High-impact digital marketing options that target the right prospects
- Professional video that instantly elevates advisor credibility and visibility
- Ready-to-use content that saves time, sounds authentic, and helps you connect
- Smart brand and marketing growth strategies that help advisors scale with clarity and confidence
- **10:00 AM - Annuity Partner Spotlight: GILICO**
  - Get actionable product insights and positioning strategies from one of our great carrier partners that will help you grow!
- **10:30 AM - FIA Tools, Resources, and Strategies**
  - 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
- **11:15 AM - Elite Advisor Spotlight: How TF helps me add services, add value, and add revenue**

*Bryan Waites and the Waites Financial Services Team*

  - 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 System is the Lifeblood of My Practice

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## Tuesday, April 28, continued

- **(CONTINUED) Elite Advisor Spotlight: How TF helps me add services, add value, and add revenue**
  - 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**
- **1:00 PM - Unlocking Powerful Life Insurance Strategies and Opportunities**  
*Tyler Schmidt, Director of Life Insurance*
  - Discover our turnkey offering for engaging more high net worth clients and business owners
  - The Dedicated Team that Makes Premium Financing Easy
  - The AI-powered LTC solution that will win you more clients
  - The New IUL Product that You Didn't Know Your Clients Needed
  - Turnkey Resources, Tools, & Marketing to Help You Close More Life Cases
- **2:00 PM - Life Insurance Partner Spotlight**
  - Get actionable product insights and positioning strategies from one of our great carrier partners that will help you grow!
- **2:30 PM - Next Steps**
  - Learn how to get started with everything you just learned and take the next steps!
- **5:00 PM - Cocktail Hour with NFL Hall of Famer Fran Tarkenton**
- **6:30 PM - Atlanta Braves vs. Detroit Tigers**
  - Private suite, dinner, open bar

## Wednesday, April 29

- **Departures**
  - Group transport provided to Hartsfield-Jackson Atlanta international airport
  - Safe travels home and we look forward to working with you in 2026 and beyond!