

PEAK Advisor Event

Tower Place 100
3340 Peachtree Rd NE
Suite 2300, Atlanta, GA



Monday, September 21

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

Tuesday, September 22

- **9:15 AM - Breakfast** - available in Tarkenton Financial office
- **10:00 AM - Welcome/Introductions**
Matt Tarkenton, President & Fran Tarkenton, Founder
- **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
- **11:00 AM - Annuity Partner Spotlight: NexAnnuity**
 - Get actionable product insights, positioning strategies, and sales ideas from our carrier sponsor and partner!
- **11:30 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
- **12:30 PM - Lunch**
- **1:00 PM - 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 Meeting to Unlock More Life Insurance Opportunities

Continued on next page

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Tuesday, September 22, continued

- **(CONTINUED) Elite Advisor Spotlight: How TF helps me add services, add value, and add revenue**
 - Why Tarkenton's Retire Ready System is 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
- **2:00 PM - Life Insurance Partner Spotlight: Allianz**
 - Get actionable product insights and positioning strategies from one of our great carrier partners that will help you grow!
- **2:15 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
- **3:15 PM - Next Steps**
 - What you can do right now to begin growing your business with our partnership!
- **5:00 PM - Cocktail Hour at the home of NFL Hall of Famer Fran Tarkenton**
- **6:30 PM - Atlanta Braves vs. Detroit Tigers**
 - Private suite, dinner, open bar

Wednesday, September 23

- **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!