

*Capital Investment Companies 24th Annual  
Sales/Compliance Conference  
Grande Dunes Marriott, Myrtle Beach, SC  
August 14 - 16, 2017*

**AGENDA**

**Monday, August 14, 2017**

<u>Time</u>	<u>Presentation</u>	<u>Sponsor</u>	<u>Location</u>
10:00 am	Registration	Capital Investment Companies	Tides 1 & 2
11:00 am	Lunch	Capital Investment Companies	Atlantic 1-4
11:00 - 11:10 am	Welcome	Richard Bryant	Atlantic 1-4
11:10 - 11:20 pm	Introduction of Strategic Partners	Jerry Payne	Atlantic 1-4
11:20 - 12:00 pm	Peter Montoya		Atlantic 1-4
12:00 - 12:10 pm	Phillip Allen		Atlantic 1-4
12:10 - 12:40 pm	Booth Time/Break		Atlantic 1-4
12:40 - 1:20 pm	Fran Tarkenton		Atlantic 1-4
1:20 - 1:30 pm	Resource Financial Services, Inc.	Rick Joyner	Atlantic 1-4
1:30 - 2:20 pm	Pershing Technology Solutions		Atlantic 1-4
2:20 - 3:30 pm	Compliance Session	Ron King	Atlantic 1-4
6:00 pm	Cocktails		Courtyard
7:00 pm	Dinner and Awards	Richard Bryant & Bill Nicholson	Atlantic 5-8

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**AGENDA**  
*Tuesday, August 15, 2016*

<u>Time</u>	<u>Presentation</u>	<u>Sponsor</u>	<u>Location</u>
7:15 - 7:45 am 7:30 am	Devotional Bible Study Continental Breakfast	Greg Hicks	Atlantic 6 Atlantic 4
8:00 - 8:05 am	Welcome	Ben Brooks	Atlantic 1-4
8:05 - 8:15 am 8:15 - 8:25 am 8:25 - 8:35 am 8:35 - 8:45 am 8:45 - 8:55 am 8:55 - 9:05 am 9:05 - 9:15 am	Bluerock Capital Sierra NextPoint (Highland Capital) Preferred Capital Cole Capital Greenbacker Triloma	Kim Comer Michelle Drummond Molly Boyce-Fields Weldon Evans Michelle Wiens Cody Lewis Matt Selman	Atlantic 1- 4
9:15 - 9:45 am	Pershing	Lisa Dolly	Atlantic 1-4
9:45 - 9:55 am 9:55 - 10:05 am 10:05 - 10:15 am 10:15 - 10:25 am 10:25 - 10:35 am 10:35 - 10:45 am 10:45 - 10:55 am 10:55 - 11:05 am	Carter Validus CNL GWG Holdings First Trust Steadfast Cantor Fitzgerald	Michelle Drummond Steve Fogerty Jason Plucinak Josh Gongaware Dave Consolino Jon Leffew	Atlantic 1-4
11:05 - 11:30 am	Booth Time/Break		Atlantic 1-4
11:30 - 12:15 pm	Compliance Session	Ron King	Atlantic 1-4
12:15 -12:45 pm	CIAS, Counsel, Advisors	Ryan, Hal, Steven	Atlantic 1-4
12:45	Raffle Drawing/ Box Lunch		Atlantic 1-4
1:00 - 1:45 pm	CIAS Compliance Session	Tess Ramby	Atlantic 1-4

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**AGENDA**  
*Wednesday, August 16, 2017*

<u>Time</u>	<u>Presentation</u>	<u>Sponsor</u>	<u>Location</u>
7:30 am	Buffet Breakfast		Atlantic 1- 4
8:00 - 8:05 am	Insurance Raffle	Bill Nicholson	Atlantic 1- 4
8:05 - 8:15 am	Great-West	Chris Snyder	Atlantic 1-4
8:15 - 8:25 am	Allianz	Al Sova	
8:25 - 8:35 am	CUNA	Paul Gauger	
8:35 - 8:45 am	AXA	Eric Brown	
8:45 - 8:55 am	Jackson National	Douglas Gresham	
8:55 - 9:05 am	Brighthouse Financial (MET)	Bob Weimer, JD Sikes	
9:05 - 9:15 am	Prudential	Kit Cagle, Kelly Chapple	Atlantic 1-4
9:15 - 9:25 am	Lincoln	Turner Creech, David Dickson	
9:25 - 9:35 am	Tarkenton	Chris Barnes, Amanda Adams	
9:35 - 9:45 am	Eagle Life	Tom Hamilton, Jay Titgen	
9:45 - 10:15 am	Break		
10:15 am - 12:00 pm	CE	Bill Nicholson	Atlantic 1-4
12:30	Closing	Bill Nicholson	Atlantic 1 -4