



**THE PINNACLE
GROUP**

**CREATIVE SOLUTIONS FOR THE
FINANCIAL SERVICES INDUSTRY**







MOST PEOPLE FEAR CHANGE — BUT CONSIDER THE ALTERNATIVE

Anyone can claim to be “forward-thinking,” but those who aren’t willing to take the necessary risks to stay on the edge of change would be lying if they did. At The Pinnacle Group, we respect where we came from—but at the same time, we commit ourselves to finding bolder, more innovative ways to make our best clients even better.

“Pinnacle has truly been a big part of the growth our firm has experienced over the past decade. Whether it’s basic planning recommendation or highly sophisticated solutions for my clients, their team of highly trained professionals has provided me with best-in-class service, support and guidance.”

ANTONIO MORENO, JR., CHFC®, ADVISOR | MPC WEALTH



WHO WE ARE

IF IT'S NOT INTEGRAL TO WHAT YOU DO, THERE'S NO POINT IN DOING IT.

The Pinnacle Group is a creative strategy and marketing firm specializing in revenue growth for the financial services industry. We partner with institutions and advisors to help them amplify their message, expand their offerings, and elevate their business by seamlessly integrating turnkey departments inside their organization. While the rest of our industry buckles under a 50-year-old model, we're constantly searching for new ways of doing business, closing gaps, growing revenue, and serving the people who matter most to you.









OUR TEAM

INNOVATION AND COMMITMENT GO HAND-IN-HAND

When you work with us, we become a literal extension of your business, a functional part of your team that provides specialized services. We firmly believe that the only way to achieve success is to be invested in the success of others, and for us, that means the success of our clients, and of their clients as well. We dedicate ourselves to helping institutions and advisors address problems and meet challenges head-on with innovative solutions and cutting-edge strategies.

“They were all that they said they were. I didn’t do a lot of insurance, but as a holistic planner, I knew that it was a very important part of the practice to know. I was able to leverage their knowledge so that I did not have to go out and actually learn all the intricate measures of insurance.”

TOM GRANT, ADVISOR | H. BECK, INC.

OFFERINGS

AND HERE'S HOW WE DO IT.

In an increasingly commodified marketplace, there's less value to selling a thing and far more value in its implementation. Anyone can promise you a successful outcome—but very few can commit to getting you there. Whether you're interested in developing a marketing strategy for a new demographic or leveraging one of our exclusive partners on a complex case, our team can provide you with unmatched, comprehensive support.

We transform . . .

. . . by working with you to create innovative strategies

*. . . by strategically planning and curating offerings
that meet your needs*

. . . by creating turnkey departments within your organization





ADVANCED PLANNING CENTER (APC)

Being educated and having access to tools is one thing - being guided by an expert is another. It's that mindset which led to the formation of our APC. We are a dynamic, multi-layered support team that helps you pinpoint business opportunities and design complex strategies for your clients. The divisions of the APC include:

- › Advanced Solutions
- › Case Design & Business Planning
- › Business Consultations
- › Life Settlements
- › Business Pension Planning



MARKETING SERVICES

As you focus on serving your clients, our marketing team can help you enhance your brand and drive business through custom strategies. Through a combination of personalized support and turnkey strategies, we ultimately help you capture the value that your work brings to others.

- › Elevate your brand messaging
- › Extend your reach to new markets
- › Create opportunities through innovative strategies



CASE SUPPORT

Our case management and underwriting teams seek to raise the bar one case at a time. We work directly with you to close business as efficiently as possible — and we even specialize in handling applications that were once rated or rejected by a carrier. What makes us different:

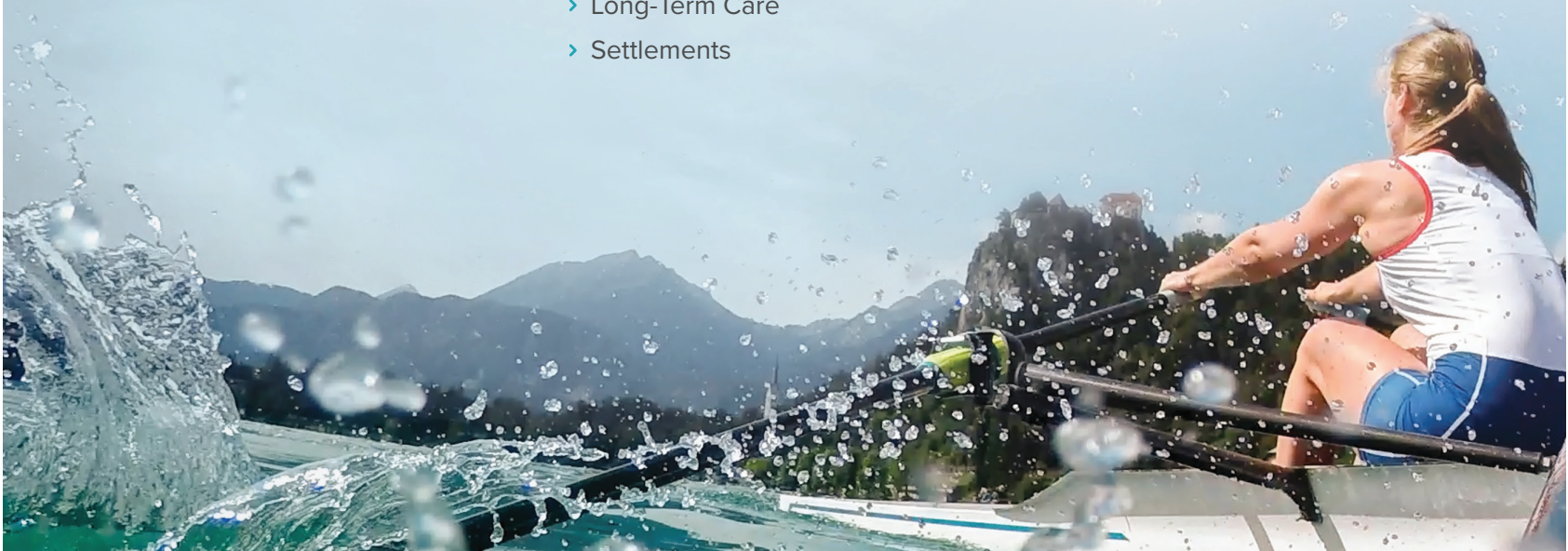
- › Underwriting Auction
- › Daily Analysis
- › Executive Review
- › Foreign National Expertise



RETIREMENT SERVICES

Dedicated to giving your client the best retirement possible, our team is here to ensure that your clients are ready for every aspect of their retirement, from the simple to the complex. Depending on the services you require, they will connect you with the right subject matter expert to kickstart the planning process.

- › Annuities
- › Senior Healthcare
- › Social Security
- › Final Expense
- › Long-Term Care
- › Settlements





NEW BUSINESS CHANNELS

We want to help you seize every opportunity available — even if it exists outside of your normal sphere of experience. By connecting with the strategic partners below, you can take advantage of a variety of niche market and broaden the services of your firm.

- › Structured Settlements
- › Property & Casualty Insurance
- › Employee Benefits



SALES SUPPORT

Pinnacle's approach to sales support is about more than just getting you from one transaction to the next. It's about helping you identify opportunities, maximizing your capabilities, and driving business in new and innovative ways.





Creative Solutions for the Financial Services Industry

- Advanced Planning Center
- Marketing
- Retirement Services
- New Business Channels

QUOTES & FORMS

CLIENT MARKETING CAMPAIGNS

FIND THE RIGHT STRATEGY FOR YOUR CLIENT:

My client:

- LIFE: HIGH-INCOME EARNER
- LIFE: BUSINESS OWNER
- LIFE: HIGH NET-WORTH

I want to:

- ANNUITY: CREATE GUARANTEED INCOME
- ANNUITY: TRANSFER WEALTH
- ANNUITY: INVEST FOR THE FUTURE
- OTHER: SOMETHING ELSE

DIRECTORY: QUICK REFERENCE

SALES
 Sales@PinnacleFS.com
 800-356-1167 - Option 3

CASE DESIGN
 CaseDesign@PinnacleFS.com
 800-356-1167 - Option 4

CASE MANAGEMENT
 CaseManagement@PinnacleFS.com
 800-356-1167 - Option 5

Full Directory
MARKETING
 Marketing@PinnacleFS.com
 800-356-1167 - Option 8

800-356-1167 | info@pinnacleifs.com
 7791 Belfort Parkway, Jacksonville, FL 32256



PRACTICE MANAGEMENT PORTAL

DON'T JUST CONDUCT YOUR BUSINESS—GROW IT.

Your portal was built with all of the quoting tools and engines you've come to expect, but also with so much more. We've designed this portal to be the go-to place for customized support in all areas of your practice. We'll even schedule personal, virtual consultations to discuss planning opportunities with you.

"The business development and business growth planning that they provide for the advisors has been incredible."

BRIAN KOVACK, CO-FOUNDER, PRESIDENT | KOVACK SECURITIES



TRULY FORWARD THINKING

The Elite Advisor Platform (EAP) was founded with one goal in mind: to empower advisors with the strategies, resources, and connections to take their business to the next level. Through annual meetings and exclusive, year-long support from the Pinnacle team, EAP advisors enjoy a truly unique experience that is unmatched in the industry.

"It's taken my business to a completely different level, where I wouldn't be if I hadn't been a member of EAP."

JOHN GURLEY, ADVISOR | PREMIER ADVISORS



WE'RE ALL IN.
ARE YOU?



THE PINNACLE
GROUP

PINNACLEIFS.COM | 800.356.1167 | INFO@PINNACLEIFS.COM

7791 BELFORT PARKWAY, JACKSONVILLE, FL 32256