

PENSCO BOSTON SYMPOSIUM

Self-Directed Investing with Alternative Assets: Your Winning Formula for Financial Success

June
10-11



AGENDA

Thursday, 6/10/10

TRACK ONE: Self-directed Investing 101

TRACK TWO: Intermediate/Advanced

7:45 - 8:15	Registration & Continental Breakfast	
8:15 - 8:30	Welcome and Introduction	
8:30 - 9:30	Keynote: How to Build a Better Business Model: Moving From ROI to ROL (Return on Life), Mitch Anthony	
9:40 - 10:30	Uncover the Secrets of Overlooked Self-directed Investing Trends & Opportunities -- Jordan S. Goodman, author	Rules, Regulations & Strategies of Using LLCs with IRAs -- Mark J. Kohler, Attorney, CPA, KKO Lawyers
10:30 - 10:40	Break	
10:50 - 11:40	How to Make Money with Alternative Assets	New PENSCO Institutional Platform (PIP) & How You Can Benefit -- Cynthia Weaver, Managing Director of Institutional Services
11:50 - 12:40	Beyond REITS & Hedge Funds -- Other Alternative Investments to consider, Sponsor?	Strategies and Scenarios for Self-directed Investing -- Tom Anderson, CEO, PENSCO Trust Company
12:40 - 1:40	Lunch & Networking	
1:50 - 2:40	How to Build Your Business with Alternative Investments -- Mike Scott, PENSCO Trust Company	How to Legally Promote Your Private Placement -- John Magliana Jr. Attorney, Bullivant Houser Bailey Law Firm
2:50 - 3:40	Increase Returns with Leverage -- Matt Allen, Director of IRA Lending, North American Savings Bank, Eric Wikstrom, CPA, Integrated Wealth Strategies	Creative Applications of the Roth IRA Conversion -- Joe O. Luby III, CFP®, President, Financial Solution, Inc
3:40 - 4:00	Break	
4:10 - 5:00	Panel Discussion: Rajeev Katyan & Frank Bridges: Strategies: Opening the Pandora's Box!!! Rob Spalding, Business Development Officer, PENSCO Trust Company: Strategies & Solutions for Self-directed Investing	How to Attract More Clients with Social Media & PR -- Robyn K. Levin, CEO, R. Levin Marketing Group
5:00 - 6:00	Cocktail Party	

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8:00 - 8:30	Networking & Continental Breakfast
8:30 - 9:15	Q & A, Meet the Speakers
9:30 - 10:30	<p>Choose between A or B workshop</p> <p>Workshop A - Tax Liens Investing</p> <p>Workshop B - Learn the New PENSCO Institutional Platform (PIP)</p>
10:30 - 10:45	Break
10:45 - 11:45	<p>Choose between A or B workshop</p> <p>Workshop A - The Pinnacle SYSTEM and REO's, An Easy Alternative to Enhance Your Retirement Account, Pinnacle Property Solution</p> <p>Workshop B - Q & A on Self-directed Investing</p>
11:45 - Noon	Break
Noon - 1:00	<p>Choose between A or B workshop</p> <p>Workshop A - How to Find and Invest in Secured Notes</p> <p>Workshop B - How to Easily Add Real Estate Into a Balanced Portfolio Strategy, John Mourraille, Market Advisors, LLC</p>
1:00 - 1:30	Networking & Wrap-Up

* Agenda is subject to change without notice. You'll walk away w/ in-depth knowledge, new insights, great connections & FREE bonus items.

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