



**February 25, 2009, 9:00 AM - 3:00 PM**

Maggiano's Little Italy  
3333 Bristol Street  
Costa Mesa, CA 92626  
(Behind the SEARS)

## MEETING AGENDA OVERVIEW

### THE EVOLUTION OF SALES WITHIN THE INDUSTRY

- Traditional vs. relational sales vs. anti-traditional sales

### IRA Distribution Strategies

- Planned Rollovers
- In Service Withdrawal
- Multi Generational IRA
- Roth Conversion 2010
- Lifetime Pay, Guaranteed Income for Life
- Protect your clients from "Heavy, Immediate and Unnecessary Taxation"
- 403(b) Rollover Strategies
- Separation from Service
- Learn about an Unprecedented and Unparalleled Opportunity

### Table Bay Training Programs

- CPA Advantage Edge Program
- HR Professionals Program
- IRA Summit
- Presenter University
- Top Gun
- Top Gun for Assistants

### TABLE BAY FINANCIAL'S PURPLE POWER MARKETING PROGRAM

- Market development/tactical marketing plans
- The Table Bay Advantage Plan
- The Lead Generation Program
- Generating hundreds of leads weekly

### Workshops

- Seminar-in-a-Box
- The power of workshops
- The seven deadly sins of workshops
- Why are we successful when so many others fail?
- Overview of our workshop solutions program

### America's IRA Centers / America's IRA Experts

- An unprecedented OPPORTUNITY in the financial services arena
- Dominate the IRA Market in your area
- Turnkey Distribution Planning System
- Exclusive Promotional Materials

### Product Training

- Annuity Products
- Life Insurance
  1. Indexed Life Insurance
  2. Mortgage
  3. Family Matters
  4. Estate Matters