GROWING YOUR BUSINESS THROUGH ADVANCED PLANNING

Jason Borek | Chief Distribution Officer

The Pinnacle Group

KOVACK FINANCIAL
PRACTICE MANAGEMENT
POWERED BY THE PINNACLE GROUP

THE PINNACLE GROUP

What is Kovack Practice Management?

Kovack Practice Management is a creative strategy and marketing firm, powered by The Pinnacle Group, specializing in revenue growth for financial advisors.

Our Approach

We transform…

…by working with you to create innovative solutions.

…by strategically curating offerings that meet your needs and those of your clients.

...by delivering industry leading resources that will help you grow your business

Advanced Planning Center

A dynamic, multi-layered support team that helps pinpoint business opportunities and design complex strategies for your clients.

Components of the Advanced Planning Center:

- Business consultation & valuation
- Advanced solutions
- Complex case design & business planning
- Intentional income tax planning

Advanced Planning Center – Business Consultants

APC BUSINESS CONSULTANTS

- Help identify, open and close new planning opportunities in partnership with the advisor.
- Support advisor in connecting with APC subject matter experts

TOM WORTHINGTON, CEP

East Coast Coordinator

TOM SELLIN, CLU, CHFC

West Coast Coordinator

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Advanced Planning Center – Business Planning

BUSINESS CONSULTATION & VALUATION

- Marshall & Stevens
- All business planning starts with business valuation
- Client consultation
- Helping clients’ business reach its maximum potential

MARK SANTARSIERO

Business valuation | Investment banking

| Business consultation

STEVE SUSEL

Investment banking | Business valuation

| Client consultation

GREG FELDMAN

Investment banking | Business valuation

| Client consultation

Advanced Planning Center

TAX PLANNING

- Complex retirement planning
- Tax-advantaged qualified plans as exit strategies
- Help achieve large income tax deductions

- Tax-advantaged qualified plans as exit strategies
- Help achieve large income tax deductions

DOUG MUELLER

Tax planning | High-net worth individuals |

Business planning

MIKE PROST

Business valuation | Litigation support |

Tax planning

CHRIS JACOB, CFP

Premium financing | Tax planning | Wealth transfer

TOM WORTHINGTON, CEP

Defined benefit planning | Business consultations |

Tax strategies

SCOTT MCHENRY

Defined benefit planning | Business consultations |

Tax strategies

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EXECUTIVE BENEFITS

- Retention and attraction of key employees through employee benefits planning
- Multi-life individual disability insurance to supplement group policies for executive teams

JEFF ACHESON

CEO of Advanced Strategies Group

Executive benefits | Tax-advantaged distribution | Defined benefits

RANDY O'BRIEN

Executive benefits | Accumulation solutions | Tax-advantaged distribution

BRETT VIRGIN

Executive benefits | Accumulation solutions | Tax-advantaged distribution

Advanced Planning Center

COMPLEX CASE DESIGN & BUSINESS PLANNING

- Appraisals
- Vast knowledge of insurance planning strategies
- Creative solutions for highly successful individuals

KENT GRIFFIN

Legal expertise | Premium financing | Exit planning

TOM SELLIN, CLU, CHFC

Advanced case design | Advisor consultations | Business consultations

DON ROSBOROUGH, CLU, CHFC

Premium financing | Tax planning | Wealth transfer

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ADVANCED SOLUTIONS

- Next Point Solutions – one of the industry's leading teams for advanced planning and leverage strategies.
- Highest level of planning expertise and risk mitigation

ROBERT STRAUSS, JD

Legal expertise | Leverage strategies | Exit planning

Andrew Weinhaus, ESQ

Legal counsel | Estate planning | Tax strategies

CHRIS JACOB, CFP

Premium financing | Tax planning | Wealth transfer

Randy Fox

Comprehensive estate and wealth transfer planning | Philanthropic planning | Income tax planning

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ESTATE & LEGACY PLANNING

- Legally complex planning strategies
- Expertise in wills, trusts, powers of attorney, successions, and more

STEPHANIE PRESTRIDGE

Attorney at Lineage Law, LLC

Estate planning | In-marriage Quadro planning

KATHLEEN CENTOLELLA

Attorney at Pact

Tax law and business formation | Legal business expertise

Andrew Weinhaus, ESQ

Attorney at Law Office of Andrew Weinhaus, LLC

Legal counsel | Estate planning | Tax strategies

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Next Level Advisor Marketing

- Earn marketing through *Pinnacle Points*
  - Through life and annuity production, you can earn Pinnacle Points and spend them on a variety of top-notch marketing services and programs

- **Life**
  - Every $100 in production earns you 1 point ($25,000 = 250 points)
- **Annuity**
  - Every $1,000 in indexed
  - Fee-based annuities earns you 1 point
  - ($250,000 = 250 points)

Next Level Advisor Marketing

Eye-Catching Videos

Relational Theme

Informational Theme

Whiteboard Theme

Customized Websites

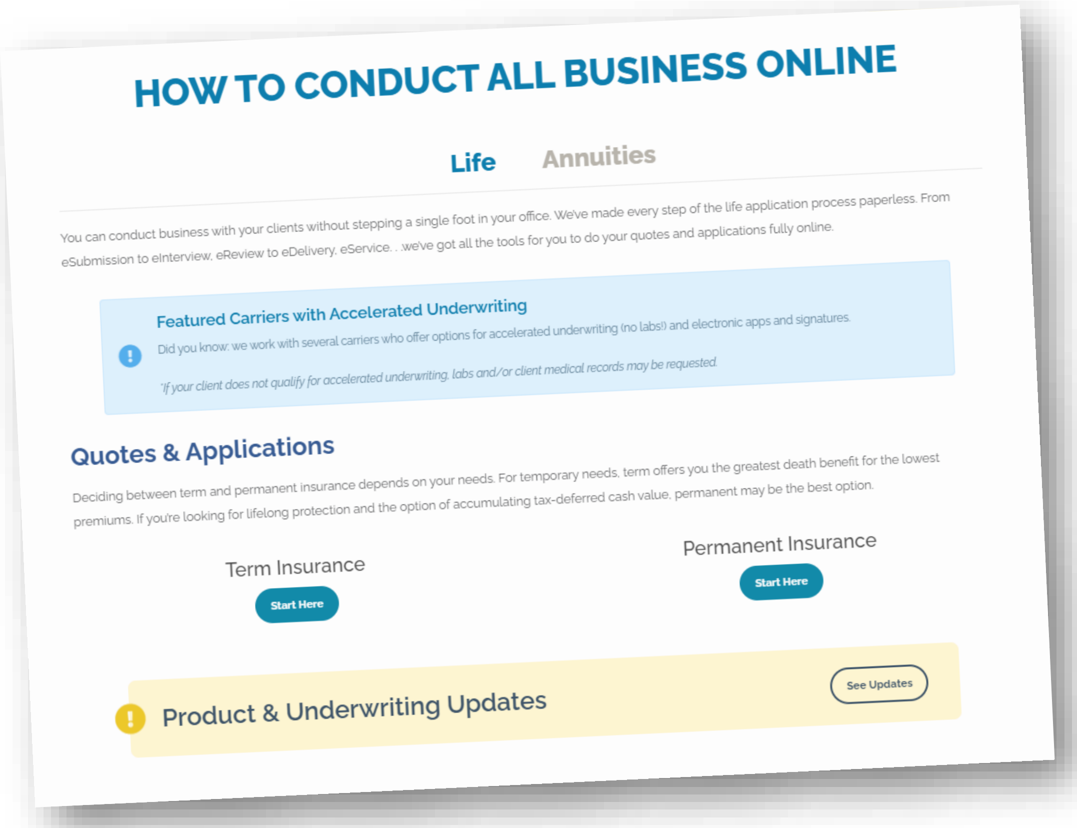
Journey Theme

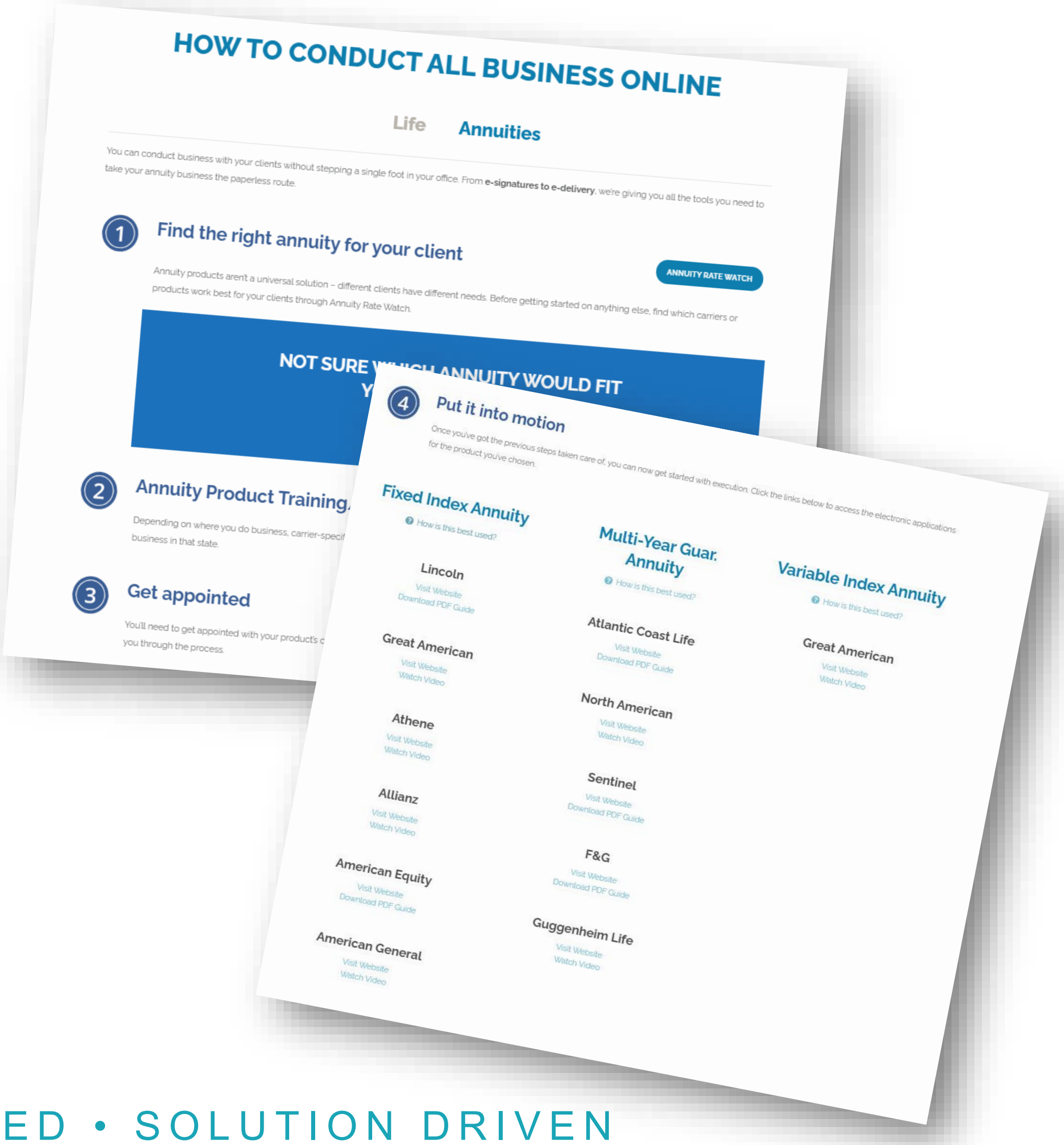
Colorful Theme

Legacy Theme

Enterprise Theme

Online Resource Center





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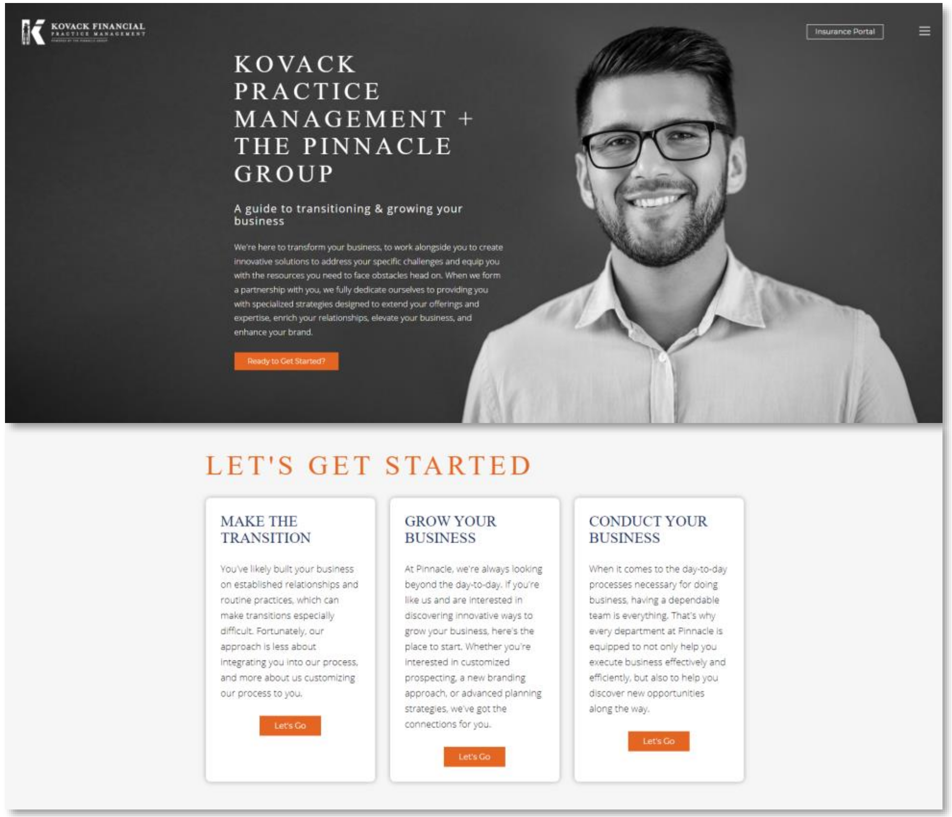
Connect With Your Team

- Partner with a team of specialists
- Leverage an array of powerful resources
- Conduct your business seamlessly
- Grow your business exponentially
- Visit **YourTeam.Pinnacleifs.com/KovackSecurities**



Questions?

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