



PACIFIC WEST®
FINANCIAL GROUP

16th Annual Leadership Summit
SPONSOR
Information Packet



*Strength In Principles...
Getting Back to the Basics*

Registration Deadline: Friday, August 14

September 16-18, 2009

The Hyatt Regency
Bellevue, Washington



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Conference Dates

September 15, 2009 Advisory Council Meeting/Dinner
September 16-18, 2009 Leadership Summit Annual Conference

Location

The Hyatt Regency
900 Bellevue Way NE
Bellevue, Washington 98004
(425) 462-1234 or (800) 233-1234
www.bellevue.hyatt.com

Register early!

**Registration
deadline is
Friday, Aug. 14**

How To Register

Please follow the steps below to register for this year's Leadership Summit:

| | | |
|---------------|--|--|
| Step 1 | Event Registration | Instructions will be emailed to you or go to: http://pwfinancial.com/join_us/Pages/LeadershipSummit.aspx ONLINE REGISTRATION OPENS JULY 6 |
| Step 2 | Hotel Reservation Deadline: Aug. 14 | If you will be staying at the Hyatt Regency, it is necessary for you to make your own reservation by going online to www.bellevue.hyatt.com or calling (800) 233-1234. Use group code G-PACW Group rate: \$239 per night plus tax |

Questions?

Office 425.271.3550
Toll-free 888.236.7979
E-mail chrissullivan@pwfinancial.com



Agenda

Agenda subject to change.

| | | |
|------------------------------------|------------------------------|---|
| Tuesday, September 15 | 12:00 pm - 5:00 pm | Registration Open |
| | After 7:00 pm | Early booth set-up |
| Wednesday, September 16 | Various Times (see pgs. 8-9) | Sights & Shopping Shuttles |
| | 9:00 am - 5:30 pm | Registration Open |
| | 11:00 am | Exhibitor/Booth Set Up Deadline |
| | 3:30 pm - 4:30 pm | Pre-conference Vendor Meeting |
| | 5:00 pm - 6:30 pm | Welcome Reception & Exhibits |
| | 6:30 pm | Dine-Around Opportunities |
| Thursday, September 17 | 7:00 am - 8:00 am | Breakfast Buffet/Exhibits |
| | 8:15 - 9:00 am | Welcome Session |
| | 9:00 - 10:00 am | Keynote Address |
| | 10:15 am - 12:15 pm | Round Table Sessions GROUP A (1-5) |
| | 12:15 pm - 1:30 pm | Lunch/Exhibits |
| | 1:30 pm - 4:50 pm | Breakout Sessions |
| | 2:40 - 3:40 pm | Sponsor Session: Opening Doors to Top Advisor Sales – What’s Working for Wholesalers <i>Right Now</i> ” (See pg. 15 description) |
| | 6:30 pm | Evening Reception |
| 7:00 pm | Celebration Dinner | |
| Friday, September 18 | 7:30 am - 8:30 am | Breakfast Buffet/Exhibits |
| | 8:45 am - 10:50 am | Breakout Sessions |
| | 11:05 am - 12:15 pm | Round Table Sessions GROUP B (1,2 & 3) |
| | 12:15 - 1:00 pm | Lunch/Exhibits |
| | 1:15 - 2:00 pm | Round Table Sessions GROUP B (4 & 5) |
| | 1:15 pm | Exhibitor Tear Down |
| | 2:15 pm - 3:30 pm | Closing Speaker/Closing Remarks |



Hotel Accommodations

Hyatt Regency Bellevue
900 Bellevue Way NE
Bellevue, Washington 98004

Phone (800) 233-1234
(425) 462-1234
Fax (425) 698-4281

Register early!

**Registration
deadline is
Friday, Aug. 14**

Room reservation website: www.bellevue.hyatt.com
[enter group code G-PACW]

All attendees must make their own hotel arrangements directly through the Grand Hyatt website or by calling the Hyatt at (800) 233-1234 or (425) 462-1234 (be sure to mention you are with Pacific West Financial Group to obtain our group rate).

The Hyatt Regency Bellevue has set aside guest rooms for Pacific West during our event at a special rate of \$239 per night (double occupancy). **The last day our group rate will be available is Friday, August 14.** As with all hotels, these rooms are available on a space available basis. There is a per night charge of \$25 for each additional person (maximum of four occupants per room).

Please note: All hotel rooms at the Hyatt are non-smoking in accordance with Washington State law.

Check-in time: 3:00 pm
Check-out time: 12:00 pm



Hyatt Regency Bellevue Overview



Reward yourself with uncompromising luxuries at Hyatt Regency Bellevue. Ideally located just 17 miles from Sea-Tac International Airport and 9 miles east of Seattle in downtown Bellevue, this Four-Diamond Bellevue Washington hotel is perfectly positioned for work, play or both. Located within The Bellevue Collection, a premier urban streetscape with over 250 shops, 22 restaurants and lounges, a landmark cinema, a contemporary billiards and comedy club, day-spas, and Lucky Strike Lanes – all connected by sky-bridges. A very green picturesque Northwest city, Bellevue is home to outdoor adventures like hiking, boating, golfing and more. Plus guests enjoy easy access to Woodinville Wine Country and of course the many unique landmarks and attractions that have made Seattle famous.

Rooms & Amenities

- T-Mobile[®] Hotspot[®]
- Hyatt Grand Bed[™]

Guest Services

- Concierge Services
- 24-7 Business Center
- In-Room dining
- Regency Club

Dining & Entertainment

- O/8 Seafood Grill and Twisted Cork Wine Bar
- Daniel's Broiler
- Joey's
- Tully's
- Stir Martini & Raw Bar

Activities

- Complimentary access to 7,000 sq. ft. state-of-the-art Hyatt Stay Fit gym
- Heated indoor lap pool
- Salon services on property
- Nearby golf - Newcastle, Willows Run and Echo Falls Country Club
- Skiing, water sports, biking, hiking and many more outdoor adventures nearby

Local Attractions

- The Bellevue Collection - 250 stores, 19 restaurants and lounges, a landmark cinema, the stylish Parlor Billiards, Comedy Club, and Lucky Strike Lanes
- Bellevue Art Museum; Bellevue Botanical Gardens; Old Bellevue
- Burke-Gilman Trail
- Woodinville wineries - Chateau Ste. Michelle; Columbia and brewery - Redhook
- Kirkland waterfront and gallery walk



Round Tables

What is a Round Table?

The Pacific West Round Table program is structured to provide our representatives the opportunity to learn about multiple products directly from product vendor company representatives in a focused learning environment.

For this event, each participating product vendor company will be assigned a Round Table on either Thursday or Friday morning at which they will conduct 5 back-to-back, 20-minute sessions with our representatives. A moderator will signal the end of each 20-minute session and, promptly after 5-minutes, the beginning of the next session until all 5 sessions for that day have been completed.

Please be prepared to stimulate discussion and answer questions related to your company and current product(s). Although you may bring a prepared presentation and make product-specific materials available to our reps, we suggest these business sessions be focused on Q&A and open discussion with our representatives.

If you have any questions, please feel free to contact our Product Specialist, Chris Sullivan at chrissullivan@pwfinancial.com or (425) 687-4306/(888) 236-7979.

Booth/Exhibitor Information

Each booth will be a table-top booth that is 6' x 3' in size. You may set your booth up anytime after 7:00 pm on Tuesday, September 15. All booths should be set up by our deadline of 11:00 am on Wednesday, September 16. Our annual compliance meeting will begin at 3:00 pm that day, and many of our attendees will arrive earlier in the day to check-in to the hotel and may wish to visit booths during this time while awaiting their meeting. This is a good time for networking.

There will be a location in the hotel reserved exclusively for our exhibitors supplies. It will be necessary for you to communicate with the hotel staff to have your materials delivered to your booth upon your arrival at the hotel.

There will be extra charges for requests such as a power supply to your booth. You may request these items by contacting the hotel directly.



Shipping of Materials

If you are sending materials to the hotel prior to our event, **please ship to arrive no earlier than Sept. 9** (one week prior). Items should be sent to your attention. The hotel's inbound package storage area logs all shipments under alpha name whether you are staying at the Hyatt Regency Bellevue or not.

Please also include the name/date of our event on your package. It's also helpful if you mark multiple packages "1 of 4, 2 of 4" etc. Retrieval of your materials may be made on site by contacting the bell desk or the star meeting concierge (dial 0 from the hotel). In most cases, there will be a holding fee charged for your materials.

Sample label:

Your Name/Company
c/o Hyatt Regency Bellevue
900 Bellevue Way NE
Bellevue, WA 98004

Hold For: Pacific West Leadership Summit 9/16/09-9/18/09
1 of 3 boxes

Suggested Attire

The majority of the time, the dress is Business Casual. Below is a list of our event days and the recommended dress for each activity.

| Day | Event | Suggested Attire |
|-----------|--------------------------|------------------|
| Wednesday | Morning Shuttle Services | Casual |
| | Reception | Business Casual |
| Thursday | Business Sessions | Business Casual |
| | Awards Dinner | Semi Formal |
| Friday | Business Sessions | Business Casual |

Dine Around Opportunities

There is a dine-around opportunity on Wednesday, September 16 in the evening following our welcome reception. We strongly suggest that you begin to organize your dine-around event early as representatives will be receiving invitations from other product vendors.

You are responsible for sending out invitations and for making arrangements at the restaurant of your choice.

If you would like restaurant recommendations, we suggest you contact the hotel concierge.

Reception/Drink Tickets

There will be two receptions that will be held on Wednesday and Thursday nights of the event. On Wednesday, the reception will begin at 5:00 pm and on Thursday the reception starts at 6:30 pm, just prior to our Celebration Dinner.

If you would like to purchase drink tickets for a guest, you may do so during the reception at the designated area. You may charge these to your room or use a credit card.

Sights & Shopping Shuttles

On Wednesday September 16, Pacific West is pleased to offer you two exciting opportunities to get around the beautiful Puget Sound. There is a complimentary coach that will take you to either Downtown Seattle or Downtown Kirkland. See the descriptions below to decide which location is more to your liking. Sign up now to ensure space on the coach. There will be a tour guide on each coach who will be available to you throughout the morning to answer questions, assist with directions & other fun facts. Maps and attraction information will be provided.

Seattle Sights & Shopping Shuttle

8:30 am Shuttle departs Hyatt Regency Bellevue

9:00 am Drop off at Pike Place Market

9:15 am Drop off at Seattle Center

11:15 am Return Shuttle #1 Departs (Seattle Center)

11:30 am Return Shuttle #1 Departs (Pike Place Market)

1:30 pm Return Shuttle #2 Departs Seattle (Seattle Center)

1:45 pm Return Shuttle #2 Departs Seattle (Pike Place Market)



You can't take a trip to the Emerald City without getting experiencing the fun flavors of downtown Seattle. Take our shuttle service directly from the Bellevue Hyatt Regency for an adventure into Seattle. You will be dropped off to enjoy the city at your own pace, checking out those sights that most interest you and shopping to your heart's content. These are some stops you may want to put on your short list of things to see and do:

The Space Needle (opens 9:30am): A 41-second elevator ride takes you up 520 feet to the observation deck of the Space Needle, built for the 1962 World's Fair. Enjoy a meal at Sky-City, the restaurant at the top that revolves 360° while you dine. Cost to ride to observation deck: \$16, (Elevator ride free if dining at the restaurant which opens at 11:30am)

www.spaceneedle.com

Ride the Ducks (tours start 10am): Travelers and local Seattle-ites of all ages love to Ride the Ducks! The hilarious, Coast Guard-certified maritime captains will take you on a 90-minute adventure tour of Seattle while they narrate historical information and local folklore, dance to funky music and **QUACK** you up with jokes and comedy! Then, **SPLASH** into the water to cruise on Lake Union and view a breath-taking view of the Seattle skyline! We recommend purchasing your tickets (10am, 10:30am or 11am) in advance. Cost: \$25.

www.ridetheducksofseattle.com

Pike Place Market: Born in 1907, Seattle's Pike Place Market is the granddaddy of farmers' markets. Today, it's a major tourist attraction with 200 businesses operating year-round, 190 craftspeople and 120 farmer booths - plus street performers and musicians. Flowers by the bucketful, flying fish, fresh pastries and fruit, handmade cheeses, local honey, wine, an assortment of restaurants, import goods, antiques, collectibles and lots of surprises are around every corner. Don't miss getting a coffee at the original Starbucks across the street from the Market. www.pikeplacemarket.org

Seattle Waterfront: A bustling collection of attractions, restaurants and shopping, as well as

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starting points for ferries, cruise ships, the Victoria Clipper and Argosy boat tours are located here. Feed the seagulls at the statue of Ivar Haglund in front of Ivar's Acres of Clams, stroll by the fountains on the wooden piers of Waterfront Park and admire the view or shop for souvenirs. www.seattlewaterfront.org

Ferry Ride: Traveling by ferry is a state of mind as much as a means of transportation to some of the Puget Sound's most historic and scenic sites. Views of the Olympic and Cascade Mountains, the Seattle cityscape and the green shorelines will draw you out onto the deck to feel the salt breeze on your face. Take the 35-minute Bainbridge Ferry ride at 9:35am or 10:40am for a wonderful experience. You will need to return on the 11:30am or 12:20pm ferry from Bainbridge. Cost: \$6.70 per adult passenger. www.wsdot.wa.gov/ferries

Seattle Aquarium (opens 9:30am): Meet Alki, the sea otter pup born at the Aquarium. Walk under the water in a glass dome as bluntnose sixgill sharks and other Elliott Bay creatures swim all around you. Touch a sea anemone. Learn about the lives of salmon at the world's first aquarium-based salmon ladder. Marvel at the impossibly bright-colored coral reef fish. And don't forget to wave to the giant Pacific octopus. Cost: \$16 www.seattleaquarium.org

Kirkland Sights & Shopping Shuttle

9:00 am: Shuttle departs Hyatt Regency Bellevue

11:30 am: Return Shuttle #1 Departs Kirkland

1:30 pm: Return Shuttle #2 Departs Kirkland

The growing metropolis of Bellevue happens to be located just four miles south of the nearby waterfront town of Kirkland, home to many parks, galleries and boutique shopping. Take our shuttle service directly from the Hyatt Regency in Bellevue for a quick trip to downtown Kirkland. You will be dropped off to enjoy the city at your own pace checking out those sights that you are most interested and shopping to your heart's content. Some stops you may want to put on your short list of things to see and do while in Kirkland:



Art Galleries: The downtown area of the city is located on the shore of Lake Washington and features several art galleries.

Public Art: The city also has an impressive collection of public art, especially bronze sculptures that you will notice within galleries and also sprinkled throughout the city to delight.

Boutique Shopping: Find dozens of wonderful and eclectic shops along the downtown streets to suit your style.

Restaurants: Plenty of options from casual to fine dining including Anthony's Home Port in Moss Bay Marina for a sampling of the freshest catch of the day amid the best waterfront view.

Performing Arts Center: Open in June 1998, and designed by Becker Architects, the 402 seat maroon-and-beige theatre is spacious, yet retains an intimate feel. The farthest seat is just 13 rows - 40 feet - from the stage; the steep rake of the house provides excellent sightlines throughout the theatre. The seats are ample with extra legroom for comfortable seating. The acoustics in the theatre are designed to work equally well for both music and the spoken word.

Beaches & Parks: The city has several beaches and public parks located along the waterfront, all linked by a paved trail.

Featured Guest Speakers

Keynote Speaker – Dr. Kevin Elko

Thursday, September 17, 9:00 - 10:00 am

Dr. Kevin Elko is a nationally renowned performance consultant, professional motivational speaker and author. With hundreds of standing ovations, Dr. Elko is one of the most inspirational presenters in the country today.

Dr. Elko is the author of two books, *Nerves of Steel* and *The Pep Talk*, along with several audio CD programs.

Born in Brownsville, Pennsylvania, Dr. Elko completed his Bachelors in Biology and Coaching Education at California University of Pennsylvania. He went on to West Virginia University where he completed a Masters in Counseling, a Masters in Sports Psychology, a Graduate Certificate in Gerontology, and a Doctorate in Education with a major emphasis in Sport and Counseling. Also, he is a Certified Addictions Counselor.

Patrick Kuhse – 2 Hours CE Ethics Credit

Friday, September 18, 8:45 - 10:50 am

Patrick Kuhse became an expert on ethics the hard way - by taking part in his own criminal acts and suffering the consequences. Kuhse originally worked as a successful stockbroker, but he kept his clients in the dark about a number of important issues. The situation got worse when a friend offered Kuhse a position as the investment advisor for the multi-billion dollar investment portfolio of the state of Oklahoma. He accepted, and with his "greed goggles" on, illegally bumped up his commission.

After being caught, Patrick Kuhse spent four years on the lam in Costa Rica, trying to avoid the FBI and the federal government. Eventually, he decided to turn himself in and take responsibility for his actions. He spent four years in prison, and now devotes himself to speaking to audiences worldwide about the importance of ethical behavior.

Patrick's dynamic presentations have entertained, enlightened and inspired countless audiences. From Harvard to Stanford, he is a favorite on college campuses and is a frequent keynote presenter and guest speaker at various forums including in-house seminars, industry and trade conferences.

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Maribeth Kuzmeski, Red Zone Marketing

Thursday, September 17, 2:40 pm - 3:40 pm **(FOR SPONSORS ONLY)**

Take advantage of the huge opportunity to **create impact** and generate **more sales than ever** from financial advisors. Learn what some of the top advisors want and need and what top producing wholesalers are giving them. Not only does Maribeth Kuzmeski work with the nation's most successful advisors helping them build their businesses, she also works with many of the top producing wholesalers for mutual fund, variable annuity and life organizations to develop business plans to generate large and consistent sales. She will share what's working right now to create more sales.

As a popular past presenter at Leadership Summit, Maribeth Kuzmeski, President of the consulting firm Red Zone Marketing, works with the nation's most successful, million dollar producers to assist them in continuing to grow and systematize their practices. Maribeth has written 4 books including *"The Connectors: How The World's Most Successful Businesspeople Build Relationships and Win Clients for Life."* She is an international keynote speaker, has spoken at the Million Dollar Round Table and has created webinars, top advisor toolkits, and other marketing initiatives for Broker Dealers, Mutual Fund and Insurance companies. Maribeth has been featured in hundreds of publications including Business Week, Entrepreneur, National Underwriter, Senior Market Advisor, Financial Advisor, Investment News, and Registered Rep.

Closing Speaker -Jim Abbott

Friday, September 18, 2:15 - 3:15 pm

Former major league baseball player Jim Abbott, who overcame a birth defect of only one hand, beat the odds and became an amazing professional baseball pitcher for the Los Angeles Angels, the New York Yankees, and a Gold Medal Olympian for the American baseball team.

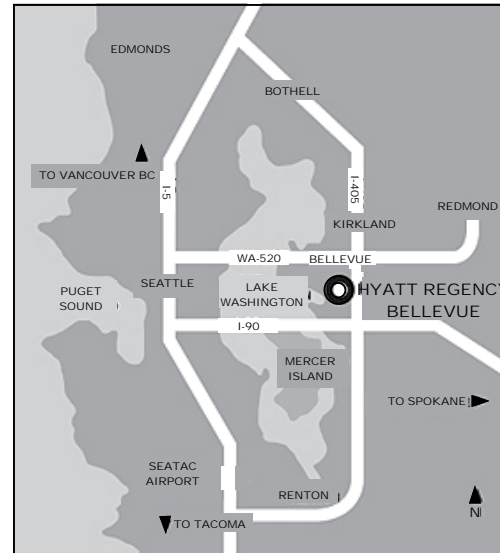
Today he is a celebrity speaker, living in Southern California. Through stories, anecdotes and jokes, Jim Abbott's motivational keynote speech shows that people can overcome adversity and limitations to reach their dreams and goals.



Directions to Hyatt Regency Bellevue

Hotel Address

900 Bellevue Way NE
Bellevue, WA 98004



Directions from Sea-Tac International Airport (17 miles):

Follow signs to "All Freeways." Take Hwy. 518 to 405 North to Bellevue for 14 miles. Exit onto NE 8th St. West (exit #13B). Follow NE 8th for 6 1/2 blocks. Hotel is on right after crossing 106th Ave, at corner of NE 8th and Bellevue Way.

From West (Seattle):

Merge onto WA-520 E exit number 168B toward Bellevue. Merge onto I-405 S toward Renton. Take the NE 8th Street East/West exit number 13B. Take the NE 8th St West ramp, merge onto NE 8th St. Turn right on Bellevue Way.

From North (Vancouver B.C.):

Follow Provincial Route 99 South. Provincial Route 99 S becomes I-5 South. Merge onto I-405 S via exit number 182 toward Bellevue/Renton. Take NE 8th St. East/West exit number 13B. Take the NE 8th St West ramp, merge onto NE 8th St. Turn right on Bellevue Way.

From East (Spokane):

Take Freeway Avenue N and merge onto I-90 W for 269 miles. Take the I-405 S exit number 10 toward Renton/Bellevue. Merge onto I-405 N toward Bellevue/Everett. Take the NE 8th St West ramp exit number 13B, merge onto NE 8th St. Turn right on Bellevue Way.