

# THE PATH TO YOUR PINNACLE

## From Basecamp to Pinnacle

### PINNACLE

**Where life and business align.**  
The goal is not simply growth. It is building a business that performs at a high level while supporting the life you want to live!

### Pinnacle

#### Annual Tactical

Month 12

#### Annual Summit

Month 12

### ASCENT

**Sustain momentum.**  
Between sessions, the work continues. Through consistent engagement, the team strengthens execution, builds accountability, and maintains forward progress.

### ANNUAL SUMMIT (1ST YEAR)

#### Reflect and reset.

Once a year, the team steps back from the day-to-day to evaluate progress, celebrate wins, and unite around the path to the future and the plan to achieve it.

#### Quarterly Tactical

Month 9

#### Quarterly Summit 2

Month 9

### TACTICAL FOCUS (EVERY 90 DAYS)

**Your Extended Team.**  
You have three separate teams comprised of Legal, Insurance, Financial and Tax pros. These teams specialize in everything you need for your Personal, Business and Employment matters.

### QUARTERLY SUMMITS (EVERY 90 DAYS)

#### Create focus and traction.

Each quarter, the team pauses to reflect, assess progress, and realign around what matters most. Priorities are reset, challenges are addressed, and the team moves forward with renewed clarity and focus.

#### Quarterly Tactical

Month 6

#### Quarterly Summit 1

Month 6

### BASECAMP (MONTHS 1-2)

#### Build the Foundation.

Each Basecamp is designed to align the Leadership Team around where you are today and where you are going. Every Basecamp includes two connected experiences:

- A **Strategic** session, where the team creates clarity, alignment, and direction.
- A **Tactical** session, where that clarity is translated into focused execution.

Together, these sessions ensure that progress is both intentional and actionable.

#### Employment Tactical

Month 2

#### Basecamp Day 2

Month 2

#### Business Tactical

Month 2

#### Basecamp Day 1

Month 1

#### Personal Tactical

Month 1

### THE APPROACH

#### Owner and Spouse.

Before we start climbing, we ensure we're heading towards the right mountain! Your business is a tool to elevate your life. We get in sync about priorities in your life.

#### The Approach