

AGENDA

DEVELOPING HOLISTIC ADVISORS: THE INTERSECTION OF FINANCIAL PLANNING AND LIFE INSURANCE

June 3-4, 2019

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

Monday June 3rd

12:00pm	Lunch	The Belted Goat
1:00pm	Introductions of Participants and Sponsors: <i>Participants</i> describe their business model, the type of client they engage in planning and if there is a cost. <i>Sponsors</i> update us on their business and new initiatives	The Barn
2:00pm	Who Has a Financial Plan: Consumer Appetite for Financial Advice: Tim Kehrer and Christine Kehrer	
2:30pm	The ROI of Financial Planning: Preliminary Findings from Analysis of Advisor Level Data: Ken Kehrer and Jamie Kosharek	
3:15pm	Break	
3:30pm	Managing and Coaching the Planning Process: The Dashboard: Leigh Van Heule and Kristefor Lysne	
4:15pm	Focus on the Experience Stack, Not the Tech Stack: Jeff Schwantz and Connor Sung Research and group case study observations on why enterprises should be focused on the “Experience Stack” and not the tech stack, but rather focusing on those technology elements that are client-facing, drive client satisfaction and overall practice growth. In the world of hyper-personalization, we examine how consumers of relevant, modern advice expect to understand how decisions they make will impact their financial goals.	
6:00pm	Reception	Garden Terrace
7:30pm	Dinner	Garden Terrace

AGENDA

DEVELOPING HOLISTIC ADVISORS: THE INTERSECTION OF FINANCIAL PLANNING AND LIFE INSURANCE

June 3-4, 2019

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

Tuesday, June 4th

7:30am-9:00am	Breakfast	Ferrington House Inn
9:00am	Identifying the Traits of Holistic Advisors: Ken Kehrer and Tony Cole	The Barn
9:45am	Using Incentives to Encourage Adoption: Peter Bielan Insights from the 2018-2019 Kehrer Bielan Survey of Advisor Compensation in Financial Institutions and 2018-2019 Kehrer Bielan Sales Manager Compensation Survey	
10:30am	Break	
10:45am	Integrating Life Insurance into the Planning Process: Will Gilfillan	
11:15am	Developing a Planning Process Leigh Van Heule and Peter Bielan	
11:45am	Upcoming Initiatives at Kehrer Bielan Research & Consulting Surveys, research, and study groups	
12:00pm	Wrap up and Lunch	The Belted Goat

Additional Information:

Hotel Checkout is at 12pm. Please factor in 40 minutes of travel time to the Raleigh-Durham airport. Taxis are not readily available.