

AGENDA

LEADERSHIP STUDY GROUP: FALL RECAP

September 16-18, 2019

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

Monday, September 16

6:00pm	Reception	The Belted Goat Terrace
7:30pm	Country Buffet Dinner	The Belted Goat

Tuesday, September 17

7:30am-9:00am	Breakfast	Ferrington House Inn
9:00am	Introductions: Participants describe their plans to grow revenue in light of fee compression, a shortage of advisors, declining referrals, and regulatory confusion	The Barn
10:15	Focus on Revenue and Profit Growth, Not Margin: Peter Bielan and Tim Kehrer What you and the top of the house should be tracking	
10:45am	Break	
11:00am	Demonstrate the Value of the Investment Services Business to the Banking Enterprise: Tim Kehrer and Chris Kehrer	
11:45am	Focus on Planning: Ken Kehrer and Leigh Van Heule Research identifies the outsized benefits of embracing planning, and the hurdles that advisors and managers have to overcome.	
12:30pm	Lunch	The Belted Goat
1:30pm	Managing Financial Planning: Leigh Van Heule, Kristefor Lynse and Chris Clarke First step: monitoring activity that identifies coaching opportunities and tracks plan quality	
2:15pm	Develop Advisor Teams: Ken Kehrer New research describes how [and why] firms develop teams, and the benefits of teaming	

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3:00pm	Break	
3:15pm	Managing to the Right Metrics: Peter Bielan and Tim Kehrer How to use data and analytics to prioritize your allocation of resources to drive growth	
4:00pm	Penetrating the Mass Affluent: Ken Kehrer and Tim Kehrer A sneak peek on the market segment findings from the BISA study of the impact of the investment services business on the host institution	
4:45-5:00pm	Kehrer Bielan Plans for 2020 Your chance to shape our agenda	
6:00pm	Reception	Garden Terrace
7:30pm	Dinner	Garden Terrace
Wednesday, September 18		
7:30am-9:00am	Breakfast	Ferrington House Inn
9:00am	Departures	

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.
