

# AGENDA

## WEALTH MANAGEMENT STUDY GROUP

October 8–9, 2019

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

### Tuesday, October 8

12:00pm	Lunch	The Belted Goat
1:00pm	<b>Introductions of Participants and Sponsors:</b> <i>Participants</i> describe how their firm's wealth management businesses are structured and how they segment delivery to different types of clients  <i>Sponsors</i> provide an overview of their business and how they support wealth management in financial institutions	Upstairs at McIntyre's
2:00pm	<b>How Are Financial Institutions Delivering Wealth Management?</b> Ken Kehrer and Tim Kehrer  Findings from a Cetera-sponsored survey of 104 banks and credit unions	
2:45pm	<b>How Has the Current Model Performed?</b> Tim Kehrer and Ken Kehrer  Disappointing growth and cost pressures, competition from index funds and digital advice	
3:30pm	Break	
3:45pm	<b>Integrating Delivery of Wealth Management Services: Melding The Advice Offerings</b>	
4:30pm	<b>Integrating Delivery of Wealth Management Services: Unifying the Delivery of Financial Advice with Wealth Advisors at First Interstate</b>	
6:00pm	Reception	The Garden Terrace
7:30pm	Group Dinner	Ferrington House Inn

# AGENDA

## WEALTH MANAGEMENT STUDY GROUP

October 8–9, 2019

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

### Wednesday, October 9

7:30am-9:00am	<b>Breakfast</b>	Ferrington House Inn
9:00am	<b>Integrating Delivery of Wealth Management Services: Organizing Delivery around the Client Portal at Hancock Whitney</b>	Upstairs at McIntyre's
9:45am	<b>Integrating Delivery of Wealth Management Services: Unifying Trust and Brokerage Platforms</b>	
10:30am	<b>Break</b>	
10:45am	<b>Integrating Wealth Management Services: Leading with Planning.</b> Leigh Van Heule and Chris Clark  Financial planning as the unifying principal across the full range of client needs.	
11:15am	<b>Open Discussion of Other Issues</b>	
11:45am	<b>Upcoming Initiatives at Kehrer Bielan Research &amp; Consulting</b>  Surveys, research, and study groups	
12:00pm	<b>Wrap up and Lunch</b>	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.