

# AGENDA

## DEVELOPING HOLISTIC ADVISORS: A KEHRER BIELAN STUDY GROUP

Dec 8-9, 2021

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

### Wednesday, Dec 8th

12:00pm	Lunch	The Belted Goat
1:00pm	<b>Introductions:</b> <i>Participants</i> describe their firm's business model, and where they are on the journey to incorporating planning in their advisors' practices and embracing holistic advice. <i>Sponsors</i> describe how they support the delivery of financial planning and the development of holistic advisors.	Upstairs at McIntyre's
2:00pm	<b>Why Should Advisors Embrace Planning?</b> Ken Kehrer and Tim Kehrer	
3:00pm	Break	
3:15pm	<b>Advisor Engagement in Planning:</b> <ul style="list-style-type: none"><li>• Case Studies</li><li>• Coaching to Change Behavior</li></ul>	
4:00pm	<b>Incenting Advisors to Engage in Planning:</b> Tim Kehrer and Peter Bielan	
6:00pm	Reception	Ferrington House Bar
7:30pm	Dinner	Ferrington House Restaurant

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### Thursday, Dec 9th

7:30am-9:00am	<b>Breakfast</b>	Ferrington House Inn
9:00am	<b>Client Engagement:</b> Mike Hemmert	Upstairs at McIntyre's
9:45am	<b>Charging for Financial Plans</b>	
10:30am	<b>Break</b>	
10:45am	<b>Alternative Planning Delivery Models</b>	
11:30am	<b>Other Issues in Developing Holistic Advisors:</b> Participants	
11:45am	<b>Upcoming Initiatives at Kehrer Bielan Research &amp; Consulting:</b> Research, consulting, and study groups	
12:00pm	<b>Wrap up.</b> Boxed lunches available in the break room	Upstairs at McIntyre's

### 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.