

AGENDA

INTEGRATING WEALTH MANAGEMENT SERVICES: A KEHRER BIELAN STUDY GROUP

Nov 17-18, 2021

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

Wednesday, Nov 17

12:00pm	Lunch	The Belted Goat
1:00pm	How Financial Institutions Deliver Wealth Management Services: <i>Participants</i> describe their firm's delivery of investment, Trust, and asset management services, including organizational structure, client segmentation, and back office platforms. <i>Sponsors</i> describe how they support the delivery of wealth management in financial institutions.	The Cottage
2:00pm	How Do the Financial Institution Models Perform? Ken Kehrer and Tim Kehrer	
3:00pm	Break	
3:15pm	How Do Wirehouses and RIAs Deliver Wealth Management Services? Peter Bielan and David Coffaro	
4:00pm	How Are the Financial Institution Models Evolving? Ken Kehrer	
6:00pm	Reception	Ferrington House Bar
7:30pm	Dinner	Ferrington House Restaurant

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Thursday, Nov 18

7:30am-9:00am	Breakfast	Ferrington House Inn
9:00am	A Client-Centric Model of Wealth Management Services: David Coffaro and Peter Bielan	The Cottage
10:30am	Break	
10:45am	Benchmarking the Delivery of Personal Wealth Management Services: Ken Kehrer	
11:30am	Other Wealth Management Issues: Participants	
11:45am	Upcoming Initiatives at Kehrer Bielan Research & Consulting: Research, consulting, and study groups	
12:00pm	Wrap up. Box lunches available in the Garden Terrace	The Garden Terrace

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.