

AGENDA

FALL LEADERSHIP STUDY GROUP: MANAGING INVESTMENT SERVICES INSIDE A FINANCIAL INSTITUTION

Sept 29-30, 2021

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

Wednesday, Sept 29

12:00pm	Lunch	The Belted Goat
1:00pm	Introductions of Participants and Sponsors: <i>Participants</i> describe their business model and how they provide financial advice to different segments <i>Sponsors</i> update us on their business and new initiatives	The Barn
1:45pm	Using Data Analytics to Improve Performance Ken Kehrer and Tim Kehrer	
2:15pm	The Business Case for Growing Your Advisor Force: Tim Kehrer	
3:00pm	Break	
3:15pm	Adding Second Story Advisors to Grow Your Business: Peter Bielan and Denise Tognarina	
4:00pm	Optimization for Growth: Peter Bielan and Denise Tognarina	
4:45pm	Upcoming Initiatives at Kehrer Bielan Research & Consulting Research, consulting, and study groups	
6:00pm	Reception	Garden Terrace
7:30pm	Dinner	Garden Terrace

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Thursday, Sept 30

7:30am-9:00am	Breakfast	Ferrington House Inn
9:00am	Marketing 2021: Participants Describe Leveraging Social Media and Data Analytics to Augment Traditional Branch Referrals: Denise Tognarina and Lacey Taplin	The Barn
9:45am	Trends in Advisor Compensation: Peter Bielan	
10:30am	Break	
10:45am	Compensating Advisors for Asset Acquisition: Ken Kehrer	
11:15am	Farewell to Consumer Deposits: Tim Kehrer	
11:45am	Other Issues	
12:00pm	Wrap up and Lunch	Boxed lunches in the Barn

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.