

# AGENDA

## SPRING LEADERSHIP STUDY GROUP: MANAGING INVESTMENT SERVICES INSIDE A FINANCIAL INSTITUTION

March 31-April 1, 2022

Fearrington House Inn, Chapel Hill

Dress Code: Business Casual

### Thursday, March 31

12:00pm	Lunch	The Belted Goat
1:00pm	<p><b>Introductions of Participants and Sponsors:</b> Many firms experience strong growth last year, and the management of their institutions probably expects similar results this year.</p> <p><i>Participants</i> describe your business model and growth target for 2022. After 2021 being the best performing year in recent memory, how are you managing expectations by the top of the house? What are your plans to achieve your target?</p> <p><i>Sponsors</i> update us on your business and how you can help firms achieve their growth targets.</p>	Upstairs at McIntyre's
1:45pm	<b>Annual Industry Checkup:</b> Tim Kehrer	
2:30pm	<b>Optimizing Your Investment Services Business:</b> Arthur Osman and Peter Bielan	
3:30pm	Break	
3:45pm	<b>The Value of Sales Assistants:</b> Ken and Tim Kehrer	
4:30pm	<b>Upcoming Initiatives at Kehrer Bielan Research &amp; Consulting:</b> Research, consulting, and study groups: Denise Tognarina	
6:00pm	Reception	Garden Terrace
7:30pm	Dinner	Garden Terrace

# AGENDA

## SPRING LEADERSHIP STUDY GROUP: MANAGING INVESTMENT SERVICES INSIDE A FINANCIAL INSTITUTION

March 31-April 1, 2022

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

### Friday, April 1

**7:30am-9:00am**      **Breakfast**      Ferrington House Inn

**9:00am**      **Competition for Advisors Is Intensifying:** Participants describe what steps they are employing to keep the keepers      Upstairs at McIntyre's

**9:30am**      **Strategies for Retaining Top Advisor Talent:** Peter Bielan and Arthur Osman

**10:15am**      **Break**

**10:30am**      **The Benefits of Advisor Teams:** Ken and Tim Kehrer

**11:15am**      **KPIs for Your Business and the Kehrer Bielan Top Director Awards:** The Kehrer Bielan Team

**12:00pm**      **Wrap up**      Box lunches will be available

#### 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.