

AGENDA

INTEGRATING WEALTH MANAGEMENT SERVICES: A KEHRER BIELAN STUDY GROUP

June 9-10, 2022

Fearrington House Inn, Chapel Hill

Dress Code: Business Casual

Thursday, June 9

12:00pm	Lunch	The Belted Goat
---------	-------	-----------------

1:00pm	How Financial Institutions Deliver Wealth Management Services:	The Barn
--------	---	----------

Participants describe their role and the firm's delivery of investment and advisory services, Personal Trust, Private Banking, and asset management services, including organizational structure, client segmentation, back office platforms, and which persona best describes their wealth management business.

Sponsors describe how they support the delivery of wealth management in financial institutions.

2:15pm	Where Do Banks Stand in the Competition for Wealth Management Assets? Jon O'Neil and Ken Kehrer	
--------	--	--

2:30PM	Overview of the Integration Opportunity: Tools, Advice Solutions, Sales & Service Teams, and Platforms & Custody Peter Bielan	
--------	---	--

3:00pm	Break	
--------	-------	--

3:15pm	Opportunities for Integration: Tools Participants describe initiatives, facilitated by Peter Bielan	
--------	---	--

4:00pm	Opportunities for Integration: Advice Solutions Participants describe initiatives, facilitated by David Coffaro	
--------	---	--

6:00pm	Reception	Garden Terrace
--------	-----------	----------------

7:30pm	Dinner	Garden Terrace
--------	--------	----------------

AGENDA

INTEGRATING WEALTH MANAGEMENT SERVICES: A KEHRER BIELAN STUDY GROUP

June 9-10, 2022

Ferrington House Inn, Chapel Hill

Dress Code: Business Casual

Friday, June 10		
7:30am-9:00am	Breakfast	Ferrington House Inn
9:00am	Opportunities for People Integration: Sales and Service Teams Participants describe initiatives, facilitated by David Coffaro	The Barn
9:45am	Opportunities for Integration: Platforms & Custody <ul style="list-style-type: none">• Prospect Engagement and Digital Onboarding• Client Administration• Portfolio Management• Performance Analytics and Reporting Participants describe initiatives, facilitated by Peter Bielan	
10:30am	Break	
10:45am	Client-driven Change: How Do Clients Want to Access Wealth Management Services? Tim Kehrer <ul style="list-style-type: none">• Differences by asset segment• Changes over the past decade• Impact of the Pandemic	
11:15am	Benchmarking the Delivery of Personal Wealth Management Services: Ken Kehrer	
11:30am	Key Takeaways and Action Plan: Peter Bielan	
11:45am	Kehrer Bielan Initiatives	
12:00pm	Wrap up. Box lunches available in the Garden Terrace	The Garden Terrace