

## Kenneth Kehrer: PAPERS AND PUBLICATIONS

“Who Should Manage Your Advisors?” *Highlighter Series*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, April 27, 2022.

*Growing Financial Planning: Delivery Models and Planning Fees*. LPL Financial Institutions: Fort Mill, SC, April 2022.

“Moving the Goal Posts,” *Highlighter Series*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, April 13, 2022.

*Who Should Manage Your Advisors? Comparing the Performance of Advisors Managed by the Institution or Its BD Partner*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, February 2022.

“Top Director Award Winners Pull Ahead of the Pack,” *BISA Portfolio*, Bank Insurance and Securities Association, Chicago, IL: January 14, 2022.

“Does the Size of the Investment Practice Matter?” *Highlighter Series*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, January 6, 2022.

“Are You Adding Financial Advisors?” *Highlighter Series*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, November 22, 2021, with Tim Kehrer.

“The Difference Between Good and Great,” *BISA Portfolio*, Bank Insurance and Securities Association, Chicago, IL: November 23, 2021, with Tim Kehrer and Peter Bielan.

“Does Financial Planning Drive Life Insurance Sales?” *Highlighter Series*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, August 20, 2021.

“Most of Your A and B clients Are Probably Already Retired,” *BISA Portfolio*, Bank Insurance and Securities Association, Chicago, IL: August 11, 2021, with Tim Kehrer.

“Bank BDs Make Progress in Rightsizing Client Books,” *Highlighter Series*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, July 21, 2021.

“Are Some of Your Top Producers Actually Slackers?” *Highlighter Series*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, May 24, 2021.

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“Uptick in Interest in Life Insurance During the Pandemic,” *BISA Portfolio*, Bank Insurance and Securities Association, Chicago, IL: March 3, 2021, with Tim Kehrer and Steve Lipker.

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“Looking for Your Advisors to Embrace Planning? Put it in their business plans,” *Highlighter Series*. Kehrer Bielan Research & Consulting: Chapel Hill, NC, February 18, 2021.

“Why Are We Focusing on the Mass Affluent?” *BISA Portfolio*, Bank Insurance and Securities Association, Chicago, IL: January 7, 2021, with Tim Kehrer.

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*Smart Investment 2: How Investment Services Drives Growth of Banking Services, Supporting a Mass Affluent Strategy*. Bank Insurance and Securities Association, Chicago, IL: October 26, 2020, with Tim Kehrer.

“How Many of the Bank’s Customers Are Viable Investment Clients?” *BISA Portfolio*, Bank Insurance and Securities Association, Chicago, IL: September 21, 2020, with Tim Kehrer.

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*Smart Investment: Evaluating the Total Return on Investment Services to the Banking Enterprise*. Bank Insurance and Securities Association, Chicago, IL: January 28, 2020, with Tim Kehrer and Peter Bielan.

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