

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

September 21–22

The Durham Hotel

Dress Code: Business Casual

Thursday, September 21

12:00pm	Lunch	The Roof
1:00pm	Introductions of Participants and Sponsors: Budgeting and planning season is upon us. <i>Participants</i> describe the size and scope of your business, performance against plan so far this year, and the institution's expectations for the coming year. <i>Sponsors</i> update us on your business and what you are seeing among your partner institutions.	Mezzanine Room
2:00pm	Looking Under the Hood: How Access to Advisor Level Data Reveals New Insights into Managing the Business – Tim Kehrer	
2:30pm	Advisor Tenure – Identifying the Stress Points and the Cost of Attrition – Ken Kehrer	
3:00pm	Break	
3:15pm	Why Financial Institutions Should Stop Managing the Investment Services Business on Profit Margin – Tim Kehrer	
4:00pm	The Ramp-up of Newly Hired Advisors: When Does a New Hire Breakeven? – Ken Kehrer	
4:30pm	Rethinking Optimal Branch Assignments – Tim and Ken Kehrer	
6:00pm	Reception	The Roof
7:30pm	Dinner	Rue Cler 401 E Chapel Hill St

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Friday, September 22

8:00am-9:00am	Breakfast	Mezzanine Balcony
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9:00am	Advisor Retention:	Mezzanine Room
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Participants describe their advisor retention experience and retention strategies. What steps you are taking to keep the keepers?

Sponsors describe best practices in their partner institutions.

9:45am	The Role of Digital Advice in Tiered Levels of Service – Tim Kehrer
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10:30am	Break
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10:45am	Case Study: Supplementing Face-to-Face Advisors with Digital Solutions – Peter Brittain
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11:15am	The ROI on Financial Planning – Why Bank-Based Advisors Have Not Embraced Financial Planning – Ken Kehrer
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11:45am	Wrap up
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12:00pm	Lunch	The Roof
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Additional Information:

Hotel Checkout is at 12 pm. Please factor in 20 minutes of travel time to the Raleigh-Durham airport.