

DEVELOPING HOLISTIC ADVISORS: A KEHRER STUDY GROUP

December 4–5

The Rizzo Center

Dress Code: Business Casual

Monday, December 4th

12:00pm	Lunch	Meadowmont Grill
1:00pm	Introductions of Participants and Sponsors <i>Participants</i> describe the scope of your wealth management business and the role of financial planning <i>Sponsors</i> update us on your business and how you are helping your partner institutions realize their financial planning aspirations	Magnolia AB
1:45pm	Why Do Firms Need to Embrace Planning? Are Financial Institutions Keeping Up with the Competition? Tim Kehrer	
2:00pm	Tiered Levels of Service: Who Should Have a Financial Plan? What Constitutes a Comprehensive Plan? Planning Lite? Ken Kehrer	
2:30pm	Who Should Deliver Planning? Tim Kehrer	
3:00pm	Break	
3:15pm	The Economics of Planning: How Much Time Does It Take to Create a Plan? Update a Plan? Ken Kehrer	
4:00 pm	Should You Charge for Planning? Tim Kehrer	
4:30pm	Is Financial Planning the Gateway for Advisors to Meet the Risk Management Needs of Their Clients? Tim Kehrer	
6:00pm	Reception	Loudermilk West Pre-Function



Agenda

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Tuesday, December 5

7:30am-9:00am	Breakfast	TBD
9:00am	The ROI on Financial Planning – Why Bank-Based Advisors Have Not Embraced Financial Planning: Ken Kehrer	Magnolia AB
9:45am	Driving Financial Planning -- The Role of Client Engagement: Tim Kehrer	
10:30am	Break	
10:45am	Driving Financial Planning – Goals and Financial Incentives: Tim & Ken Kehrer	
11:15am	Driving Financial Planning – The Role of Teams: Ken Kehrer	
11:45am	Wrap up	Box lunches available outside the meeting room

Additional Information:

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