

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

May 18-19

Rizzo Center, Chapel Hill

Dress Code: Business Casual

Thursday, May 18

12:00pm	Lunch	Meadowmont Grill
1:00pm	Introductions of Participants and Sponsors: The banking crisis is taking up a lot of oxygen in the press, and many banks are beleaguered by deposit withdrawals and plunging market valuations. <i>Participants</i> describe your business model and how the banking crisis is impacting your advisors, and the institution's expectations for your business. <i>Sponsors</i> update us on your business and what you are seeing among your partner institutions.	
2:00pm	Annual Industry Checkup: Tim Kehrer	
2:30pm	Paths to Growth – Harnessing Data and Industry Experience to Optimize Performance: Ken Kehrer and Arthur Osman	
3:00pm	Break	
3:15pm	Advisor Tenure – Identifying the Stress Points and the Cost of Attrition: Ken Kehrer	
3:45pm	Internal Barriers to Growth -- Disintermediation Zombies and Focus on Profit Margins: Tim Kehrer	
4:15pm	Assessing the Second Story Strategy: Ken Kehrer	
4:45pm	The Role of Digital Advice in Tiered Levels of Service: Tim Kehrer	
5:00pm	Reception	Pergola
6:30pm	Dinner	DuBose House Library



Agenda

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6:30am-9:30am	Breakfast for Overnight Guests	Meadowmont Grill
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9:00am	Advisor Recruiting and Retention:	Magnolia Room C
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Participants describe their advisor recruiting and retention strategies. How long did it take to fill your last vacancy? What steps you are taking to keep the keepers?

Sponsors describe best practices in their partner institutions.

10:00am	Strategies for Retaining Top Advisor Talent: Arthur Osman
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10:30am	Break
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10:45am	The ROI on Financial Planning – Why Bank-Based Advisors Have Not Embraced Financial Planning: Ken Kehrer
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11:15am	Serving Next Generation Investors: Tim Kehrer
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11:45am	Wrap up
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12:00pm	Lunch: Boxed lunches will be available	Outside Magnolia C
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Additional Information:

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