

INTEGRATING WEALTH MANAGEMENT SERVICES: A KEHRER STUDY GROUP

June 22–23

Carolina Inn, Chapel Hill

Dress Code: Business Casual

Thursday, June 22

1:00pm	Introductions: <i>Participants</i> describe their role in the firm's delivery of wealth management and the scope of the enterprise's wealth management business across the banking enterprise: • Assets • Number of client-facing staff • Number of service/administrative staff <i>Sponsors</i> update the group on their services and how they support the delivery of wealth management in financial institutions.	Chancellor East
2:00pm	The State of the Trust Business: Chris Cassidy, LPL	
2:15pm	The State of the Bank Brokerage Business: Tim Kehrer	
2:30pm	Optimizing the Delivery of Wealth Management in a Financial Institution: Kehrer Group Team	
2:40pm	Case Study – Rockland Trust: Brad Sanders, Rockland Trust	
3:00pm	Break	
3:15pm	How Do Different Wealth Segments Prefer to Access Wealth Management Services? Larry Cohen, RFI Global	
4:00pm	Case Study – Hancock Whitney: Keith LeBlanc, Hancock Whitney	
4:20pm	Case Study – Salem Five	
4:40pm	Case Study – Centennial Bank: Chris Melton, Ameriprise	
6:00pm	Reception	Club Room
7:00pm	Dinner	Alumni Room

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6:30am-9:30am	Breakfast for Overnight Guests	Crossroads Chapel Hill (vouchers at check in)
9:00am	Case Study – Peoples United	Chancellor East
9:20am	Case Study – Arvest: Clay Nickel, Arvest	
9:40am	Case Study – Industry Bancshares: Corey Hacker, Cetera	
10:00am	Next Generation Wealth Clients: Tim Kehrer	
10:30am	Break	
10:45am	Alternative Wealth Management Models: Kehrer Group Team	
11:30am	Benchmarking the Delivery of Personal Wealth Management Services: Ken Kehrer	
11:45am	Kehrer Group Initiatives	
12:00pm	Wrap up.	
	Box lunches available in Chancellor West	

Additional Information:

Hotel Checkout is at 11am. Please factor in 20 minutes of travel time to the Raleigh-Durham airport.