

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

September 11–12

The Carolina Inn

Dress Code: Business Casual

Wednesday, September 11

12:00pm	Lunch	Chancellor West
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1:00pm	Introductions of Participants and Sponsors: <i>Participants</i> describe the organizational structure of the institution's investment services business, including assets and advisor headcount. How are you performing against plan, and what is the target growth you expect next year? <i>Sponsors</i> update the group on their services and their views on prospects for growth next year.	Chancellor East
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2:00pm	Examining the Growth Record of Bank-Based Financial Advice: Findings from Kehrer Group Surveys – Tim Kehrer	
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2:15pm	Advisor Recruitment, Development and Retention • Trends in Advisor Coverage • Growing Your Own: Delta Community Credit Union • How Long Until a New Advisor Becomes Profitable? • Understanding Advisor Attrition • Advisor Compensation • Sunsetting Senior Advisors • Who Owns the Client? Firm-Advisor Partnerships	
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3:00pm	Break	
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3:15pm	Modernizing Prospecting • Trends in Branch referrals – Tim Kehrer • Identifying Hidden Assets – Arthur Osman and Kris Lysne	
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4:00pm	Client Productivity: The Optimum Size of Advisor's Books	
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4:30pm	Penetration of the Opportunity: Trends in Revenue Penetration and Household Penetration	
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6:00pm	Reception	Club Room
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7:00pm	Dinner	Alumni Room
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Wednesday, April 10

7:30am-9:00am	Breakfast	Chancellors West
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9:00am	Findings from the Kehrer Group Survey of Director Compensation • Incentive plan structures • Determinants of total cash compensation • How does your compensation stack up?	Chancellors East
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10:30am	Break
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10:45am	Kehrer Group Top Directors Awards
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11:15am	Optimizing the Second Story Strategy
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11:45am	Wrap up
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12:00pm	Lunch	Chancellors West
	Boxed lunches available	

Additional Information:

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