



Agenda

DEVELOPING HOLISTIC ADVISORS: A KEHRER STUDY GROUP

October 21–22

The Rizzo Center

Dress Code: Business Casual

Monday, October 21st

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 in their institution's omni delivery strategy – licensed branch staff, investment call center, digital platform, branch-based advisors, second story advisors, wealth advisors, and the bank's delivery channels <i>Sponsors</i> update us on your business and how you are helping your partner institutions realize their financial planning aspirations	Meeting Room 340
2:00pm	Trends in Financial Planning in Banks and Credit Unions. Ken Kehrer	
2:15pm	The Importance of Financial Planning to the Banking Enterprise. Tim Kehrer	
2:45pm	Break	
3:00pm	Taking an Organization-Wide View of Financial Planning. Arthur Osman and Erik Schwarz	
4:15pm	Using Financial Planning to Integrate Omni Channel Delivery of Financial Advice. Ken Kehrer	
6:00pm	Reception	The Pergola/Rizzo Gardens
7:30pm	Dinner	Dubose House



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Tuesday, October 22nd

7:30am-9:00am	Breakfast	Meadowmont Grill
9:00am	What Can a Director Do to Drive Financial Planning Activity? Tim and Ken Kehrer	Meeting Room 340
10:30am	Break	
10:45am	Financial Planning FAQs.	
11:30am	Shaping the Kehrer Group Research Agenda	
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 Raleigh-Durham airport.