

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

April 9–10

Durham Hotel

Dress Code: Business Casual

Tuesday, April 9

12:00pm	Lunch	The Roof
1:00pm	Introductions of Participants and Sponsors: Our focus this meeting is on how to grow your advisor force and compensate for the shortfall of advisors with ways that optimize the use of this scarce resource. We call it advisor extenders. <i>Participants</i> describe your business model [sales force(s), size] and what you are doing to supplement your advisors: a second story strategy, junior advisors, teams, licensed bankers, digital advice platforms, etc. <i>Sponsors</i> update us on your business and what you are seeing among your partner institutions.	Mezzanine Room
2:00pm	Annual Industry Checkup-- Tim Kehrer	
2:30pm	Advisor Extenders: Teams, Digital Advice Platforms, Licensed Bankers – Ken Kehrer	
3:00pm	Break	
3:15pm	Second Story Advisors: Who? When? How? Compensation? Results? – Tim & Ken Kehrer	
4:00pm	Optimizing Branch Territories – Ken Kehrer	
4:30pm	Managed Programs: Let the Broker Dealer Do It – Tim Kehrer	
6:00pm	Reception	The Roof
7:30pm	Dinner	Rue Cler: 401 E Chapel Hill

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

April 9–10

Durham Hotel

Dress Code: Business Casual

Wednesday, April 10

7:30am-9:00am	Breakfast	Mezzanine
---------------	-----------	-----------

9:00am	Overcoming Institutional Barriers to Hiring Advisors: Investing Profits in New Hires-- Tim Kehrer
--------	--

10:00am	The Ramp-up of Newly Hired Advisors: When Does a New Hire Breakeven? – Ken Kehrer
---------	--

10:30am	Break
---------	-------

10:45am	What's Coming This Year: 360 Degree View of Clients
---------	---

11:00am	Finding Hidden Assets in Your Client Book
---------	---

11:15am	Influencers Poll
---------	------------------

11:30am	Compensation Survey of Investment Services Directors
---------	--

11:45am	Wrap up
---------	---------

12:00pm	Lunch	The Roof
---------	-------	----------

Additional Information:

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