

INTEGRATING WEALTH MANAGEMENT SERVICES: A KEHRER STUDY GROUP

June 12–13

Carolina Inn, Chapel Hill

Dress Code: Business Casual

Wednesday, June 12

12:00pm	Lunch	Chancellor Ballroom West
1:00pm	Introductions: <i>Participants</i> describe the organizational structure of the institution's wealth management business(es), the reporting structure, and the scope 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 Ballroom East
2:00pm	The State of the Wealth Management Business in Financial Institutions: Trust: Ken Kehrer Bank Brokerage: Tim Kehrer	
2:30pm	Case Study – Creating One Wealth at Hancock Whitney: Jim Fujinaga	
3:00pm	Break	
3:15pm	Managing Separate Sales Forces: • Aligning compensation • Regulatory constraints • Advice biases	
3:45pm	Creating a Universal Sales Force: • Training • Licensing	
4:15pm	Case Study – Merging M&T's Branch-based Advisors with A Wealth Management Firm: Matt McAfee	
4:45pm	Improving Integration with the Banking Enterprise: Where should an integrated wealth management business report?	
6:00pm	Reception	Club Room
7:30pm	Dinner	Alumni Room



Agenda

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7:30am-9:00am	Breakfast	Chancellors Ballroom West
9:00am	Case Study – Unifying the Middle and Back Offices at Webster: John Olerio	Chancellors Ballroom East
9:30am	Common Client Experience vs Tiered Levels of Service	
10:00am	Case Study -- First Citizens: Michael Wilson	
10:30am	Break	
10:45am	Unifying the Advisor Platform to Accommodate Securities Brokerage, Asset Management, and Fiduciary Services	
11:15am	Benchmarking the Delivery of Personal Wealth Management Services: Ken Kehrer	
11:45am	Kehrer Group Initiatives	
12:00pm	Wrap up. Box lunches available	Chancellors Ballroom West

Additional Information:

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