

AGENDA

DEVELOPING HOLISTIC ADVISORS: A KEHRER BIELAN STUDY GROUP

Dec 8-9, 2021

Fearrington House Inn, Chapel Hill

Dress Code: Business Casual

Wednesday, Dec 8th

12:00pm	Lunch	The Belted Goat
1:00pm	Introductions: <i>Participants</i> describe their firm's business model, and where they are on the journey to incorporating planning in their advisors' practices and embracing holistic advice. <i>Sponsors</i> describe how they support the delivery of financial planning and the development of holistic advisors.	Upstairs at McIntyre's
2:00pm	Why Should Advisors Embrace Planning? Ken Kehrer and Tim Kehrer	
3:00pm	Break	
3:15pm	Advisor Engagement in Planning: <ul style="list-style-type: none">Case StudiesCoaching to Change Behavior	
4:00pm	Incenting Advisors to Engage in Planning: Tim Kehrer and Peter Bielan	
6:00pm	Reception	Fearrington House Bar
7:30pm	Dinner	Fearrington House Restaurant

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Thursday, Dec 9th

7:30am-9:00am	Breakfast	Fearrington House Inn
9:00am	Client Engagement: Mike Hemmert	Upstairs at McIntyre's
9:45am	Charging for Financial Plans	
10:30am	Break	
10:45am	Alternative Planning Delivery Models	
11:30am	Other Issues in Developing Holistic Advisors: Participants	
11:45am	Upcoming Initiatives at Kehrer Bielan Research & Consulting: Research, consulting, and study groups	
12:00pm	Wrap up. Boxed lunches available in the break room	Upstairs at McIntyre's

Additional Information:

Hotel Checkout is at 12pm. Please factor in 40 minutes of travel time to the Raleigh-Durham airport. Taxis are not readily available.