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|  | SuperCommunity Banks Wealth Management Agenda |
|  | W Miami, Miami, FL  February 6 – 7, 2023  (Casual attire; jeans welcome) |

# [Sunday, February 5th]

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| [5:45 PM] | Meet Anat in the Lobby. Anat’s mobile: (916) 717-1710 |
| [6:00 PM] | Option dinner offsite\*. |

# [Monday, February 6th]

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| [7:30 AM] | Breakfast |
| [8:00 AM] | Roundtable Discussion  • Bring 2-3 good ideas to share with the group  • Bring one best practice  • Discuss an example of what not to do (disasters)  • Bring questions you’d like to ask |
| [10:00 AM] | Break |
| [10:15 AM] | Trust company “nuisance” fees – wire, custody, etc. and discount practices |
| [11:00 AM] | Technology, automation, and AI |
| [12:00 PM] | Lunch |
| [12:30 PM] | Innovative services, products, and structures |
| [2:00 PM] | Regulatory challenges and recent exam topics |
| [3:30 PM] | Adjourn |
| [5:45 PM] | Meet in the lobby. |
| [6:00 PM] | Dinner offsite\*. |

# [Tuesday, February 7th]

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| [7:30 AM] | Breakfast – Topics for the next meeting |
| [8:00 AM] | Trust investment platform |
| [9:15 AM] | Break |
| [9:30 AM] | Activating internal bank partnerships |
| [10:45 AM] | External partnerships with FinTechs |
| [12:00 PM] | Adjourn |

\*Guests are welcome.

Note: Please bring enough copies for everyone.