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|  | SuperCommunity Banks Wealth Management Agenda |
|  | Marriott Long Wharf, Boston, MA  September 14 - 15, 2023  (Casual attire; jeans welcome) |

# [Wednesday, September 13th]

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

# [Thursday, September 14th]

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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] | Goal-based reporting |
| [11:00 AM] | Connecting planning with business results |
| [12:00 PM] | Lunch |
| [1:00 PM] | Discounting thresholds and authority levels for you, RMs, and leaders |
| [2:00 PM] | Fee schedules – bring yours (tiers; what do you change – everything? 1099? Investment management? Etc.) |
| [3:30 PM] | Adjourn |
| [5:45 PM] | Meet in the lobby. |
| [6:00 PM] | Dinner offsite.\* |

# [Friday, September 15th]

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| [7:30 AM] | Breakfast – Topics for the next meeting |
| [8:00 AM] | Staffing levels trust and operations |
| [8:45 AM] | Service levels, tiering, standards, and expectations |
| [9:45 AM] | Break |
| [10:00 AM] | Training, segmentation, digital capabilities |
| [11:00 AM] | Partnership with FinTechs and referrals |
| [12:00 PM] | Adjourn |

Additional Topics To Explore

1.      Cost for Talent – a Tier A Relationship Manager(RM)/Portfolio Manager(PM) vs. a Tier B RM, PM. Base salary expectations plus percentage of base in Incentive Comp.

2.      BBO Model vs. Relationship Model.

3.      Does the bank have a referral goal to Wealth and if so, what does it look like.

\*Guests are welcome.

Note: Please bring enough copies for everyone.