**SCB Forums – Wealth Management Agenda**

La Fonda on the Plaza, Santa Fe, NM / September 12 – 13, 2024

(Casual attire; jeans welcome)

**Wednesday, September 11th**

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

**Thursday, September 12th**

|  |  |
| --- | --- |
| 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 | Crypto investing |
| 11:00 AM | ESQ investing |
| 12:00 PM | Lunch |
| 1:00 PM | RIA acquisition – worth it? |
| 2:00 PM | RIA – trust separation RIA – managing our assets and others Trustee for our clients and other firms |
| 3:30 PM | Adjourn |
| 5:45 PM | Meet in the lobby |
| 6:00 PM | Dinner offsite.\* |

**Friday, September 13th**

|  |  |
| --- | --- |
| 7:30 AM | Breakfast – Topics for the next meeting |
| 8:00 AM | SEI / Sales Force |
| 8:45 AM | Outsourcing investments? |
| 9:45 AM | Break |
| 10:00 AM | Soft dollars? |
| 11:00 AM | AI – use / not use / how? |
| 12:00 PM | Adjourn |

\*Guests are welcome.