**SuperCommunity Bank Peer Group Forum**

**Thursday-Friday, July 16-17, 2020**

**Casa Del Mar Hotel, Santa Monica, CA**

**INVESTMENT EXECUTIVES AGENDA**

*(Casual Attire, jeans welcome)*

# Wednesday, July 15

**5:45pm** Meet in lobby for an optional dinner. Anat’s cell number is 916-717-1710

# Thursday, July 16

 7:30 amBreakfast

 8:00 Roundtable Discussions

* 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
* Team structure and reporting (bring org chart)

 10:00 Break

 10:15 Updates continued

 12:00 pm Lunch

 1:00 Trading efficiencies

 2:00 ETFs

 2:45 Best idea this year

 3:30 Adjourn

 6:00 Dinner off-site

# Friday, July 17

 7:30 amBreakfast

 8:00 Speaker, Aaron Dorr, Sandler, O’Neill, Acquisitions update

 9:00 Investment outlook in an election year

 10:00 Break

 10:15 Robo-advisors update

 11:00 ESG – demand, sourcing expertise etc.

 12:00 pm Adjourn

\*Spouses and guests are invited.

Note: Bring enough copies for all participants.