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|  | SuperCommunity Banks Wealth Management Agenda |
|  | The Charleston Place, Charleston, SC  April 4 - 5, 2022  (Casual attire; jeans welcome) |

# [Sunday, April 3rd]

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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, April 4th]

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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] | Technology spending and justification: what add-ons are you using? |
| [12:00 PM] | Lunch |
| [12:30 PM] | Broker-dealer branding and client segmentation |
| [2:00 PM] | Dashboards and monitoring tools (bring yours) |
| [3:30 PM] | Adjourn |
| [5:45 PM] | Meet in the lobby. |
| [6:00 PM] | Dinner offsite\*. |

# [Tuesday, April 5th]

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| [7:30 AM] | Breakfast – Topics for the next meeting |
| [8:00 AM] | Economic outlook and business development opportunities |
| [9:15 AM] | Break |
| [9:30 AM] | Trust and tax law changes |
| [10:00 AM] | Client segmentation |
| [10:45 AM] | Financial planning approach and solutions |
| [12:00 PM] | Adjourn |

\*Guests are welcome.

Note: Please bring enough copies for everyone.