###### SuperCommunity Bank Wealth Management Executives Peer Group Forum

**The Hyatt Regency Gainey Ranch, Hotel, Scottsdale, AZ**

**October 4-5, 2021**

**AGENDA**

*(Casual Attire, jeans welcome)*

##### Sunday, October 3rd

5:45 Optional dinner. Meet in Lobby. Anat’s cell number is

##### 916-717-1710

##### Monday, October 4th

7:30 a.m. Breakfast

8:00 Roundtable Discussions

Bring 2-3 ideas to share with group

Bring one best practice

Discuss what not to do (disasters)

Bring questions you’d like to ask

10:00 Break

10:15 Discussions continues

12:00 Lunch

12:30 Coming back together – what does the future of staffing and real estate look like?

2:00 Compensation: salary, bonus programs, sales incentives (bring yours)

3:30 Adjourn

6:00 Dinner off-site\*

##### Tuesday, October 5th

7:30 a.m. Breakfast: Topics for our next meeting

8:00 Creating a sales organization, BDO or no BDO

learnings from other organizations

9:15 Break

9:30 Attracting and retaining younger talent

10:00 Alternative investments, including crypto

10:45 Growing your irrevocable trust business

12:00pm Adjourn

\* Spouses and guests are invited.

NOTE: Bring enough copies for all participants