###### 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