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

**The Andaz Hotel, Scottsdale, AZ**

**September 30 – October 01, 2020**

**AGENDA**

*(Casual Attire, jeans welcome)*

##### Tuesday, September 29

5:45 Optional dinner. Meet in Lobby. Anat’s cel number is 916-717-1710

##### Wednesday, September 30

 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 Christine McQueen, SVP Operations, Bank of Oklahoma, RPA

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

 3:30 Adjourn

 6:00 Dinner off-site\*

##### Thursday, October 1

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

 8:00 Economic outlook and business development opportunities

 9:15 Break

 9:30 Attracting and retaining younger talent

 10:00 Alternative investments, including PE

 10:45 Growing your irrevocable trust business

 12:00pm Adjourn

**NEXT MEETING: March 11-12, 2021**