

## **AGENDA**

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### **Saturday 13<sup>th</sup> January 2018**

13:00	Teas and coffees	All
13:30	<b>Welcome and MSI update</b>	<b>Tim Wilson</b> <i>MSI Global Alliance</i>
14:00	<b>People – an introduction on some key people challenges</b>	<b>Ed Rivera</b> <i>RiveraAdvisors, LLC</i>
14:10	<b>People round table discussion</b> <ul style="list-style-type: none"> <li>• Winning the talent war</li> <li>• Staff evaluations and feedback</li> <li>• leadership development</li> </ul>	<b>All</b>
15:15	Networking break	All
15:30	<b>Feedback on people discussion</b>	<b>All</b>
16:00	<b>The future of firms round table discussion</b> <ul style="list-style-type: none"> <li>• Partner Alignment</li> <li>• Succession planning and Retirement plans</li> </ul>	<b>Ed Rivera</b> <i>RiveraAdvisors, LLC</i>
16:15	<b>Feedback on the future of firms</b>	<b>All</b>
17:00	<b>Employment Law – the 10 mistakes employers make and how to overcome them</b>	<b>Deborah Petito</b> <i>Clark &amp; Trevithick</i>
17:30	<b>Summary and close</b>	<b>Tim Wilson</b> <i>MSI Global Alliance</i>

### **Sunday 14<sup>th</sup> January 2018**

08:30	Breakfast	All
09:00	<b>Introduction</b>	<b>Tim Wilson</b> <i>MSI Global Alliance</i>
09:05	<b>A Growth-minded firm</b>	<b>Ed Rivera</b> <i>RiveraAdvisors, LLC</i>
09:20	<b>Clients round table discussion (part one)</b> <ul style="list-style-type: none"> <li>• Becoming a trusted advisor</li> <li>• Cross selling services</li> </ul>	<b>All</b>
09:50	<b>Feedback on clients discussion (part one)</b>	<b>All</b>



10:30	Networking break	All
<b>11:00</b>	<b>Clients discussion (part two)</b> <ul style="list-style-type: none"><li>• Retention of clients<ul style="list-style-type: none"><li>○ Communicate Expectations</li><li>○ Giving a client feedback</li><li>○ Raising their fees</li></ul></li><li>• Letting go of clients ethically</li></ul>	<b>All</b>
<b>11:45</b>	<b>Feedback on clients discussion (part two)</b>	<b>All</b>
<b>12:15</b>	<b>Summary and next steps</b>	<b>Ed Rivera RiveraAdvisors</b>
12:30	Lunch	All