CRAMER ROUNDTABLE SERIES

Sales Management

09.03.26 | The Cosmopolitan *of* Las Vegas

CRAMER & associates

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Todd Nixon**
8:15am	**Building the Business: Strategy, Structure & Growth** **Discussion Focus:** How leaders are evolving the structure of their businesses to support growth, create capacity, improve profitability, and better align Wealth with the broader bank. **Be Prepared To:** Share how you are segmenting clients, creating advisor capacity, structuring advisor and support roles, measuring profitability, and aligning goals and incentives across Wealth and the bank.	**David Heffelfinger –** Atlantic Union **Mike Viscardi –** Wilmington **Matt Preble –** Santander **Arthur Osman –** Consultant
9:45am	**Building the Advisor & Business of Tomorrow** **Discussion Focus:** How firms are building the talent needed for long-term growth through recruiting, developing, and creating clear career paths and strong talent pipelines. **Be Prepared To:** Share where you are finding talent, how you develop and know when someone is ready for the next step, the career paths you are creating, and how you are approaching partnerships, succession, and keeping your talent pipeline full.	**Jamie Engle –** First Merchants **Gina Stoltz –** Hancock Whitney **David Jabczenski –** Wescom
11:10am	**The Niche Advantage Playbook** **Discussion Focus:** This session breaks down a repeatable six-month framework for building business around a niche, then shows it applied in real depth to a real example. **Be Prepared To:** Ask questions, challenge the framework, and help identify which niche to tackle next.	**Rhonda Kulhanek** **Katie Brittingham –** Consultant
11:45am	**Lunch**	

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12:45pm	**Data Presentation**	**Todd Nixon**
1:00pm	**Winning With AI: What Are We Actually Doing With It?** **Discussion Focus:** Practical ways organizations are using AI today to save time, improve coaching, create capacity, generate opportunities, and drive growth. The focus is on what is actually being used, what is working, and what others can learn from it. **Be Prepared To:** Bring one AI use case and share the business problem it solves, who is using it and how, the impact you are seeing, and what is helping – or slowing – adoption.	**Breakout Session** Credit Unions Regional Banks Big Banks
2:00pm	**Breakout Presentations: Best Idea Worth Sharing** **Discussion Focus:** A fast-paced panel sharing the best ideas from the AI breakouts, including the use cases that stood out, what others could learn from them, and where they could be applied across the group. **Be Prepared To:** Identify one idea you heard that you would take back to your organization and be ready to share why it stood out and where you could put it to work.	**Roy Echols –** Suncoast **Jess Dohner –** Johnson Financial **Tina Giambanco –** FNB
3:05pm	**Building a High-Performance Culture** **Discussion Focus:** How leaders are building organizations that can perform today while preparing their people and businesses for what comes next. **Be Prepared To:** Share one practice that has strengthened your culture, how you build trust and accountability, and how you adapt your leadership approach to different people and situations.	**Megan Richter –** Key Investments **Erik Pinter –** Landmark **Teo Trandafir –** UW Credit Union
3:45pm	**Ask Anyone Anything** **Discussion Focus:** An open, unscripted forum for candid peer perspectives on challenges, ideas, or lessons learned. **Be Prepared To:** Bring one question you would like the group to answer. Share ideas about preparing for 2027 and beyond.	**Open Forum**
4:00pm	**Closing Remarks**	**Rhonda Kulhanek**

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