CRAMER ROUNDTABLE SERIES

Leaders & Champions

December 4, 2025 | The Cosmopolitan *of* Las Vegas

CRAMER & associates

JackCramer.com

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Jack Cramer**
8:20am	**Managing the Business** - Key Metrics, KPIs, and Gearing Ratios - Aligning Private Bank & Wealth - Enterprise Partnerships	**Wallace Harris** – BMO **David Biliter** – First Citizens **Mike Miroballi** - Huntington
9:45am	**Growing Advisors, Creating Capacity** - Career Pathing and Succession Planning - Segmentation and Centralized Teams - Building Bench Strength	**Mike Cherny** – Citizens **Erik Pinter** – Old National Bank **Lisa Stavsky** – WesBanco
10:25am	**Ask Anyone Anything**	**Open Forum**
11:15am	- **AI Everywhere? Specifics Please** - Practical Use Cases - AI That Enhances, Not Replaces - Today Versus Tomorrow	**Special Guests**
11:45am	**Lunch**	
12:55pm	**Building the Future of Leadership** - What Effective Leadership Looks Like - Building a Strong Leadership Bench - The Impact of Sponsorship	**Leslie Anderson** – BMO **Amanda Yoho** – Proformex **Drew Farrell** – Symetra **Gina Riepel** – TruStage
2:10pm	**All Things Product** - Product Mix and Emerging Trends - Risk Management & Product Expansion - What's Ahead	**Melissa Steiner** – Ameriprise **Alex Null** – Truist **Joel Floum** – US Bank
2:55pm	**Ask Anyone Anything**	**Open Forum**
3:30pm	**Cleared for Takeoff: What's Next in 2026**	**Open Forum**
4:00pm	**Closing Remarks**	**Todd Nixon**

***Times may shift based on group engagement.**