

agenda

Be Our Guest

Abacus Planning Group, Inc.
Columbia, South Carolina
August 2nd, 2019

6:00 pm Thursday evening August 1 st	Dinner: Meet and Greet Office Tour- 2500 Devine Street, Columbia, South Carolina 29205	Abacus Team
7:30 am Friday morning August 2 nd	Breakfast, introductions, and sharing goals for the day	Cheryl Holland, CFP® Eileen Stevens, CFP®, EA®
8:00 am	Abacus: Vision, Mission, and Culture	Cheryl Holland, CFP®
8:30 am	Client Engagement: Creating Raving Fans	Cheryl Holland, CFP® Laird W. Green, CFP® Alexa N. Kirby
9:30 am	Making Toast: Creating Processes for Accelerating Growth	Corinne Hanna, CFP® Bethany Griffith, CFP®
10:30 am	Break	
10:45 am	Leadership Pipeline: Leading, Mentoring and Compensating Team Members	Alex Chastain, CFP® Bethany Griffith, CFP®
12:00 pm	Lunch: Abacus: A Culture of Business Development	Eddie Kramer, CFP® Eileen Stevens, CFP®
1:30 pm	Leveraging Technology: To Make Toast	Corinne Hanna, CFP® Anne Marie Ashworth, CFP®
2:30 pm	Break: Relaxation Response	Molly Thomas, FPQP®
2:45 pm	Abacus Tools for Success: Proper Apology, Appreciative Inquiry, Gratitude, Smart Decision Tree, When to Consult, The 6 Ws of Feedback, Delegate for Success	Charles B. Flowers, CFP® Jonathan J. Roberts, CFP®
3:45 pm	Call to Action Open Mic	Cheryl Holland, CFP®
