

## The Business of Investing – A Conversation with Balentine

As a key component of our Future of Finance program, join ASFIP for a look into the past, present and future of Private Wealth Management. Our topic “The Business of Investing – A Conversation with Balentine” will draw industry insights from senior leadership with a regionally-recognized Private Wealth Manager. Join the conversation with:

- **Robert Balentine**, Chairman – **Balentine**
- **Brittain Prigge**, CFA, President, Head of Relationship Management – **Balentine**

Our conversation will cover where the industry has evolved from, and most importantly what is the future direction of Private Wealth Management. Focal points will include:

- Business trends in Private Wealth Management (the Business of Advice).
- Practice Management and business valuation.
- Succession Planning (risks and opportunities).
- Millennials as clients – as an industry “are we ready?”
- Human Capital in Private Wealth Management.
- Defining a Client Service model for Private Wealth clients.

Bring your questions, thoughts and ideas as this is planned as an interactive event and we encourage you to be part of the conversation.

“More than 30 years ago, Robert Balentine and his father left Merrill Lynch to found Balentine & Company, believing they could deliver better advice and a better client experience away from the conflicts of a large broker dealer. With \$200K in borrowed capital, they built an independent RIA that by the late 1990’s had become the largest independent firm in the southeastern US, managing more than \$4BB. In 2002, the firm was acquired by Wilmington Trust Company and Robert became CEO of Wilmington Trust Investment Management, overseeing more than \$36BB with his Atlanta-based team. Along the way, Brittain Prigge, joined the firm in 1994 and in late 2009, they, along with 15 others, re-created Balentine as an independent firm. Today, the firm oversees more than \$3BB and Brittain serves as President and Head of Relationship Management.”