

***Leadership is the capacity to translate vision into reality.*** – Warren Bennis

POHL CONSULTING AND TRAINING, INC.

## **WEALTH EXECUTIVE FORUM 2025**

at the DoubleTree Lisle/Naperville

Starts Sunday evening, September 28<sup>th</sup>, 2025 at 6:00 p.m.

Concludes Tuesday, September 30<sup>th</sup>, 2025 at 1:15 p.m.

Could you use a ***“brainstorming”*** session with experts and peers? Do you ever wish you had someone who could be a source of **new ideas**? We all need inspiration, help or support somewhere along the line. This annual gathering of Wealth Management Executives is **unlike any other conference you might attend**.

*Here's why this is the most valuable conference you'll attend this year:*

- You're meeting in an informal but structured setting with colleagues from across the country.
- Everyone shares ideas and asks questions of one another. Get specific answers from people who have shared similar experiences. Find out what your peers are doing – *and why*.
- Share revenue, staff, profit, and growth numbers with top performing leaders.
- Take home 15 to 30 “new” ideas from the Idea Exchange.

The **“Idea Exchange”** is an opportunity to interact with your peers, ask and learn from one another. Past participants agree the “take away ideas” are immediately applicable and invaluable. Group lunches and dinners sponsored by participating vendors increase the networking opportunities and the synergies! This may be one of the best investments you make all year – **only \$395**. Register now – mark your calendar – and look forward to an inspiring and stimulating experience. Register by mail, scan and email, fax or go online at [www.pohlconsulting.com](http://www.pohlconsulting.com).

- *“Impressive group of managers- very talented and smart. Younger managers- very sharp- great for the industry. Great sharing- everyone very open to sharing- key to success of the event.” Steven*
- *“The Idea Exchange provides a great forum for discussion. I always leave with lots of actionable ideas.” Kim*
- *“Excellent value for the cost of attendance.” Steve*

**Regulator Panel:** This year instead of a Key Note Speaker we are going to have a panel that will discuss the regulatory environment! These panelists are from the OCC and Federal Reserve. The focus will be on the Regulatory Landscape and what to anticipate (in 2026 and beyond) and best practices in examination preparation and response in today's environment.

**See you September 28<sup>th</sup>!**

Please email Loyd Pohl, CEO if you have any questions at  
[elpohl@pohlconsulting.com](mailto:elpohl@pohlconsulting.com)

**Pohl Consulting and Training, Inc.**

[www.pohlconsulting.com](http://www.pohlconsulting.com)

# Wealth Executive Forum Agenda

## Sunday

6:00 - 8:00 pm Reception and Get Acquainted Cocktail Party

## Monday

7:00 - 8:00 am Breakfast at Hotel

8:00 - 9:00 am Welcome and Introductions

9:00 - 10:30 am **Compliance/Regulator Panel**

10:30 - 11:10 am Morning Break

11:00 - 12:00 pm Industry Intelligence

- Polling Exercise
- Financial Performance Comparison

12:00 - 1:15 pm Luncheon (Table Topic Discussions)

1:15 - 4:30 pm Idea Exchange Session #1  
Breaks Included

5:30 (Bus at 5:00) Dinner at Ditka's

## Tuesday

7:30 - 8:15 am Breakfast at Hotel

8:15 - 8:45 am Welcome and Polling Exercise

8:45 - 9:45 am **MANAGER'S TOOLBOX**

9:45 - 10:00 am Break

10:00 - 12:15 pm Idea Exchange Session #2

12:15 - 1:15 pm "Get-away" Lunch

# WEALTH EXECUTIVE FORUM

September 28<sup>th</sup> – 30<sup>th</sup>, 2025

*The DoubleTree Lisle/Naperville*

3003 Corporate W. Drive • Lisle, IL 60532

Please send the completed registration form and a check for \$395\* (all meals included) for each workshop participant to:

**Pohl Consulting and Training, Inc.**

PO Box 287

Rochelle, IL 61068 Fax: 815-561-3573

You can also go online to register at [www.pohlconsulting.com](http://www.pohlconsulting.com)

\*The cost for non-sponsoring vendors wishing to attend is \$1,095 per person.

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Please enroll me in the Wealth Executive Forum September 28<sup>th</sup> -30<sup>th</sup>, 2025:

Registrant \_\_\_\_\_ Nickname \_\_\_\_\_

Title \_\_\_\_\_ Department \_\_\_\_\_

Company \_\_\_\_\_

Street Address\*\* \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone (    ) \_\_\_\_\_ Fax (    ) \_\_\_\_\_

E-mail \_\_\_\_\_

**\*\* NO P.O. Boxes PLEASE!** UPS cannot deliver material to post office boxes.

**Cancellation Policy:** Cancellations accepted up to **30 days** prior to Workshop with a **\$50 Service Charge**. Substitutions only accepted thereafter.

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## Hotel and Ground Transportation Reservations

The DoubleTree by Hilton Lisle/Naperville is conveniently located near O'Hare and Midway airports. The hotel can be reached at 630/505-0900. As a participant of the Forum, you will be able to make your hotel reservation online or by phone at a discounted rate. Simply mention you are with Pohl Consulting/Wealth Executive Forum during your reservation phone call or make your hotel reservation online via our website to receive the special group rate. For further information on the DoubleTree by Hilton Lisle/Naperville or the Wealth Executive Forum, please contact our office. We can be reached at 800/677-7432 ext -4001-

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