Strategic Alignment, Alliances, and Mergers

Agenda

- Welcome and Overview of Agenda
- Strategic Alignment, Alliances, and Mergers, Will Carter, Co-Founder, McKinley Carter Wealth Services
- Q&A
- BBLI Graduation
- Adjourn – Session Evaluation

Mutual Understandings

- Keep your audio muted until you speak – be aware of background noise
- Try to speak one at a time - be concise with your comments and respectful of one another's opinions
- Due to the nature of video conferencing, we will accidently speak over one another at times. That is ok, just be courteous and mindful
- Use "thumb-talk" consensus decision-making
- Be patient, stay positive, have fun, and get it done 😊