



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 accidentally 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 😊