

PLEASE NOTE: Speakers are not confirmed unless explicitly stated 'Confirmed'

AMERICAS
FAMILY OFFICE
FORUM 2014

&

PRIVATE
BANKING

Latin America 2014

November 19th & 20th

The Four Seasons Hotel

Miami, FL

PLEASE NOTE: Speakers are not confirmed unless explicitly stated 'Confirmed'



Confirmed Speakers

Annette Franqui, Partner, Forrestal Capital (US)

Camilo Nino, Partner, AKRO Group (US)

Carol Pepper, CEO & Founder, Pepper International, LLC (US)

Christopher de Souza, Director, Broadview Ventures (US)

Edouard Thijssen, Co-founder TrustedFamily, 5th generation member, Aliaxis Group (US)

Elliot Dornbusch, Founding Partner & CEO, CV Advisors (US)

Gerard Aquilina, Global Family Office Advisor and ex-Vice Chairman, Global Emerging Markets, UBS (UK)

Emerson Pieri, Head of Wealth Management, Latin America, Haliwell Bank (Brazil)

Ernest N. Dawal, Jr., Chief Investment Officer, GenSpring Family Offices (US)

Harris Fried, CEO, The Fried Family Office (US)

Hernán Fuentes, Founder, Family Business and Office School (US)

Isaac Barrocas, Senior Director of Portfolio Management, LATAM, BNY Mellon Wealth Management (US)

Isabella Fonseca, Research Director, Wealth Management, Celent (US)

Jean Pierre Lacombe, Chief Global Markets & Strategy, IFC, The World Bank (US)

Jennifer Magana, Investment Analyst, WLD Enterprises (US)

Joan Crain, Senior Director, Wealth Strategist, BNY Mellon Wealth Management (US)

Joseph Kellogg, Wealth Planning Executive, WE Family Offices (US)

Juan Carlos Ojeda, Head of Wealth Planning, Banchile (Chile)

Julie Neitzel, Partner, WE Family Offices (US)

Kirby Rosplock, Co-trustee, Harbeck Family Foundation (US)

Luis Quijano Axle, Head of Financial Services, Grupo Bepensa (MX) (Confirmed)

Mario Dell'Oro, Executive Director, Head of Latin America Private Wealth Management, Morgan Stanley (SUI)

Mark Rogers, Vice President, Sun Life Financial International (Bermuda)

Matthew Storm, Founding Partner, CV Advisors (US) (Confirmed)

Maximiliano Del Vento, Vice President, Partners Group (US)

Paul Koch, CEO, Founder, Altasol (US)

Preston Root, 5th gen President, Root Family Board of Directors (US)

Roberta Goulart, Partner, Turim Investimentos (Brazil)

Reid Bernstein, Managing Partner, Amerin Capital, Senior Advisor, YMCA Pension Fund (US)

Santiago Ulloa, Managing Partner, WE Family Office (US)

Shalin Madan, Investment Research, Gamma Consulting – Single Family Office (US)

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Conference Agenda - Day 1 – November 19th

8:00	Breakfast & Registration
Plenary Sessions	
9:00	Chairman's Opening Remarks Mark Rogers , Vice President, Sun Life Financial International (Bermuda) (Confirmed)
9:10	Keynote address: The ultimate success story – from Bolivia, to Brightstar, to building an MLS team in Miami <ul style="list-style-type: none">• Turning challenges into opportunities• How did Brightstar rise to the top?• Why will Miami's second professional soccer team succeed? Marcelo Claure , CEO, Brightstar (US)
9:40	Keynote address: Advising the Financial elite - 7 guidelines wealthy individuals should follow when selecting a family office <ul style="list-style-type: none">• Integrity, trust and honesty• Expertise and quality of advisors• Reliable networks that are well established• Client centricity and understanding goals• Common values and philosophies• Experience and long-lasting relationships• Specialization and adapting to client's needs Keith M. Bloomfield , President & CEO, Forbes Family Trust (US)
10:10	Speed Networking & Morning Break


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Private Banking Latin America Stream		Americas Family Office Forum Stream
11:10	<p style="text-align: center;"><u>Panel</u></p> <p>Technology and alternative investments</p> <ul style="list-style-type: none">• Framework of strategies and constructing your portfolio• Analyzing enterprise risk• Understanding business objectives of investees• Operation efficiencies and supporting technology <p>Moderator: Isaac Barrocas, Senior Director of Portfolio Management, LATAM, BNY Mellon Wealth Management (US) (Confirmed) Paul Koch, CEO, Founder, Altasol (US) (Confirmed) Gabriel Porzecanski, Head of Private Bank, HSBC Private Bank (Brazil) Rogério Lot, Head of Private Banking, Banco do Brasil (Brazil)</p>	<p style="text-align: center;"><u>Roundtables</u></p> <p>Multi-family offices competing with private banks and the pros and cons of full service model</p> <p>Moderator: Roberta Goulart, Partner, Turim Investimentos (Brazil) (Confirmed)</p> <p>Women & wealth: effectively reaching women wealth owners</p> <p>Moderator: Julie Neitzel, Partner, WE Family Offices (US) (Confirmed) Maria Elena Lagomasino, Managing Partner & CEO, WE Family Office (US)</p> <p>Building your plan of succession, power sharing models and mortality factors</p> <p>Moderator: J.C. Collar, CEO and CIO, Quantum Family Office Group (US)</p> <p>How to ensure security and privacy within your family and family office; social media breaches and risk management of file sharing and email usage</p> <p>Moderator: Edouard Thijssen, Co-founder TrustedFamily, 5th generation member, Aliaxis Group (US) (Confirmed)</p>

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11:50	<p style="text-align: center;"><u>Roundtables</u></p> <p>Investing in illiquid real estate in South America</p> <p>Moderator: Juan Carlos Ojeda, Head of Wealth Planning, Banchile (Chile) (Confirmed)</p> <p>How will energy reforms in Latin America impact investments in the energy sector?</p> <p>Moderator: Maximiliano Del Vento, Vice President, Partners Group (US) (Confirmed)</p>	<p style="text-align: center;"><u>Panel</u></p> <p>Managing the wealth of non-US families with multination residencies</p> <ul style="list-style-type: none"> • Family governance dynamics • Planning; taxation and buying power • Reporting; FATCA and transparency <p>Moderator: Joan Crain, Senior Director, Wealth Strategist, BNY Mellon Wealth Management (US) (Confirmed)</p> <p>Joseph Kellogg, Wealth Planning Executive, WE Family Offices (US) (Confirmed)</p> <p>Kirby Rosplock, Co-trustee, Harbeck Family Foundation (US) (Confirmed)</p> <p>Carol Pepper, CEO & Founder, Pepper International, LLC (US) (Confirmed)</p>
12:30	Networking Lunch	
Plenary Sessions		
1:50	<p>Panel Debate: Family Offices and Private Banks – conflict or collaboration?</p> <ul style="list-style-type: none"> • Conflicts of interests and ethical investment dilemmas • Why family offices need strategic relationships with wealth managers • Managing assets vs. managing asset managers • High touch services; who has the advantage? • Hidden benefits and disadvantages <p>Ernest N. Dawal, Jr., Chief Investment Officer, GenSpring Family Offices (US) (Confirmed)</p> <p>Julie Neitzel, Partner, WE Family Offices (US) (Confirmed)</p> <p>Matthew Storm, Founding Partner, CV Advisors (US) (Confirmed)</p> <p>Hernán Fuentes, Founder, Family Business and Office School (US) (Confirmed)</p>	
2:30	<p>Unstoppable forces</p> <ul style="list-style-type: none"> • The power of HNW women • The future of wealth is now • Engaging future clients today <p>Mark Rogers, Vice President, Sun Life Financial International (Bermuda) (Confirmed)</p>	

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3:00	Afternoon Networking Break
4:00	The liquidity premium, does private equity pay and if so in what format? -direct investing vs. investing funds Elliot Dornbusch , Founding Partner & CEO, CV Advisors (US) (Confirmed)
4:40	Wealth Technology Showcase <i>Uncover the new tech innovations for family offices and banks during this fun action packed competition. Each entrant gets 5 minutes to pitch their product before you decide who has the X factor!</i> Judges: Isabella Fonseca , Research Director, Wealth Management, Celent (US) (Confirmed) Lewis J. Altfest, Ph.D. , CEO, Chief Investment Officer, and Principal Advisor, Altfest Personal Wealth Management (US) Paul Arango , Managing Director, LatAm, Credit Suisse Private Banking & Wealth Management (US & LatAm)
5:20	Chairman's Closing Remarks
5:25	Pool Party Network poolside with HNWIs, family offices, and private banks while enjoying cocktails, hors d'oeuvres and live music! 

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Conference Agenda - Day 2 – November 20th

8:00	Breakfast & Registration
Plenary Sessions	
9:00	Chairman's Opening Remarks
9:10	The growing role of family offices in LatAm as alternative providers of capital to SMEs <ul style="list-style-type: none">• Piquing clients' interests by forming investor clubs• Opportunities and partnerships with law firms and accountancies• The importance of having the right experienced people for your co-investments Gerard Aquilina , Global Family Office Advisor and ex-Vice Chairman, Global Emerging Markets, UBS (UK) (Confirmed)
9:40	Panel Debate: What are the best investment opportunities in Latin America? <ul style="list-style-type: none">• Direct investments• Co-investments• GPs and fundraising opportunities Reid Bernstein , Managing Partner, Amerin Capital , Senior Advisor, YMCA Pension Fund (US) (Confirmed) Jim Herlihy , Managing Director, Deutsche Bank Private Wealth Management (US) Ricardo Uribe , Director, Suomi Investments Family Office (US)
10:10	Networking & Morning Break

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Private Banking Latin America Stream		Americas Family Office Forum Stream	
11:10	<p><u>Panel</u></p> <p>What do private banks need to do in order to retain top talent?</p> <ul style="list-style-type: none"> • Financial fees, structures, and incentives • Human resources • Leveraging technology costs <p>Mario Dell'Oro, Executive Director, Head of Latin America Private Wealth Management, Morgan Stanley (SUI) (Confirmed) Emerson Pieri, Head of Wealth Management, Latin America, Haliwell Bank (Brazil) (Confirmed) Manuel Torroella, Head of Private Bank, HSBC Private Bank (Mexico) Dan Taylor, Vice President & Regional Director, International Wealth Management, Royal Bank of Canada (CA)</p>	<p><u>Roundtables</u></p> <p>Empowering your trustee: institutional trustees vs. family members and ensuring positive relationships</p> <p>Moderator: Preston Root, 5th gen President, Root Family Board of Directors (US) (Confirmed)</p> <p>How can I get the most impact from my philanthropic strategies?</p> <p>Moderator: Christopher de Souza, Director, Broadview Ventures (US) (Confirmed) Neal Simon, CEO & Founder, Highline Wealth Management (US)</p> <p>Geopolitics, your money, and you: how global events are impacting our investment decisions</p> <p>Moderator: Harris Fried, CEO, The Fried Family Office (US) (Confirmed)</p>	
11:50	<p><u>Roundtables</u></p> <p>Debate: The trust protector as a fiduciary</p> <p>Moderator: Diego Pivoz, Head of Wealth Planning – Latin America, HSBC Private Bank (SUI)</p> <p>How to protect your bank, clients and assets from money laundering</p> <p>Luis Quijano Axle, Head of Financial Services, Grupo Bepensa (MX) (Confirmed)</p>	<p><u>Panel</u></p> <p>Debate: Single Family Offices vs. Multi Family Offices</p> <ul style="list-style-type: none"> • Common assumptions and mistakes when determining your family office • Wealth management and investment strategies crucial to your ideology • How can you avoid inaccurately estimating the size of your wealth <p>Annette Franqui, Partner, Forrestal Capital (US) (Confirmed) Camilo Nino, Partner, AKRO Group (US) (Confirmed) Jennifer Magana, Investment Analyst, WLD Enterprises (US) (Confirmed) Shalin Madan, Investment Research, Gamma Consulting – Single Family Office (US) (Confirmed)</p>	

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12:30	Networking Lunch
Plenary Sessions	
2:00	Asset allocation and direct investments <ul style="list-style-type: none">• Private equity vs. hedge funds• Opportunities in distressed markets• Real-estate & energy investments Santiago Ulloa , Managing Partner, WE Family Office (US) (Confirmed)
2:30	Closing keynote: The global economy and market conditions – analyzing countries with sound demographic, income, productivity, and competitiveness trends with macro parameters Jean Pierre Lacombe , Chief Global Markets & Strategy, IFC, The World Bank (US) (Confirmed)
3:00	Chairman's closing remarks and end of conference