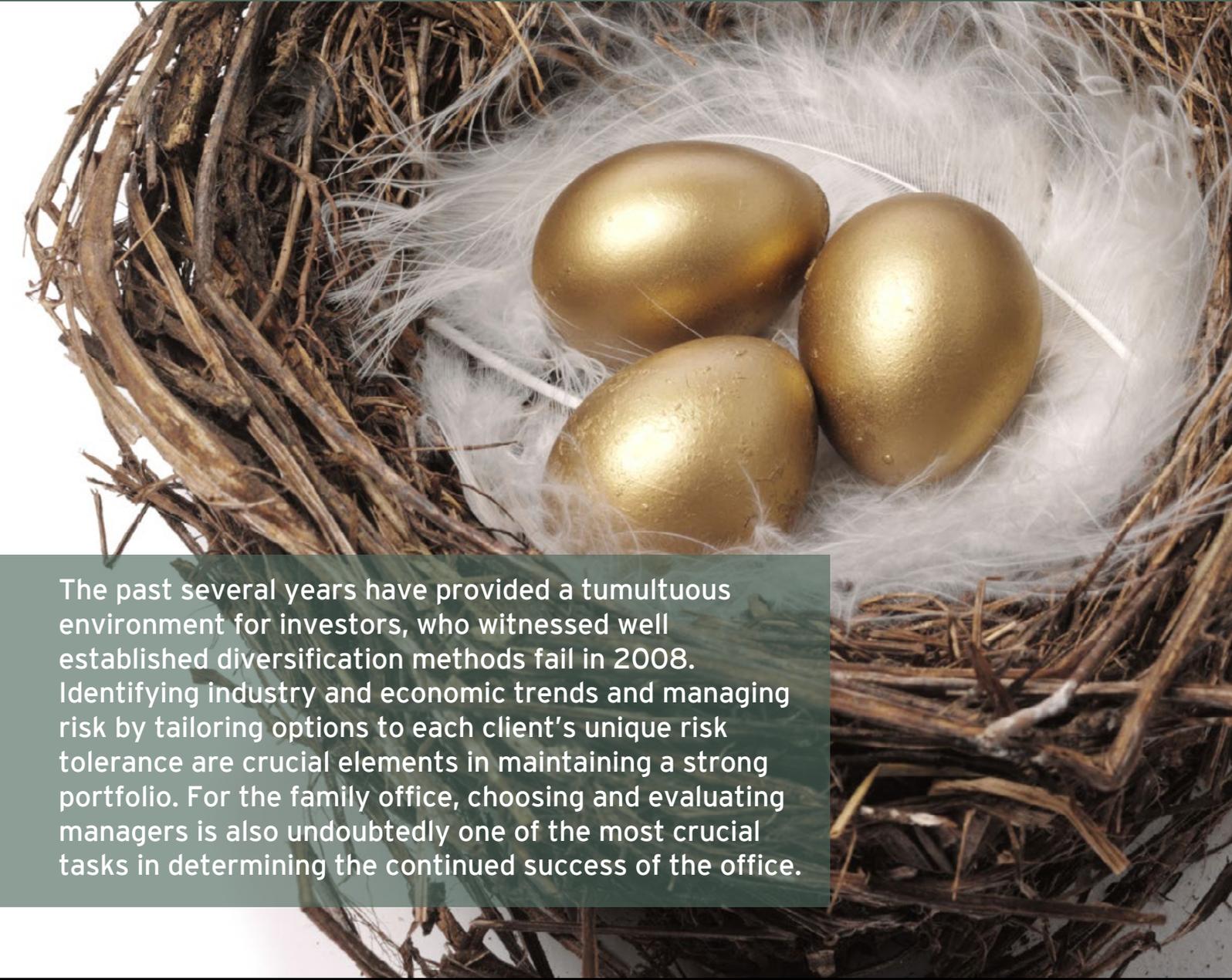


IFG WEALTH MANAGEMENT FORUM

THE PREMIER EVENT FOR NORTH AMERICAN FAMILY OFFICES

October 20-21, 2014

Four Seasons Resort • Palm Beach, FL

A close-up photograph of a bird's nest. The nest is constructed from a dense, intricate arrangement of dry, brown sticks and twigs. In the center of the nest, three large, smooth, golden eggs are nestled together. A single, long, white feather with a soft, downy texture lies across the eggs and the surrounding sticks. The background is a plain, light color, making the nest and its contents stand out.

The past several years have provided a tumultuous environment for investors, who witnessed well established diversification methods fail in 2008. Identifying industry and economic trends and managing risk by tailoring options to each client's unique risk tolerance are crucial elements in maintaining a strong portfolio. For the family office, choosing and evaluating managers is also undoubtedly one of the most crucial tasks in determining the continued success of the office.

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INVESTOR ATTENDEE INFORMATION

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Investment Perspectives Redefined

Successfully maneuvering today's changing financial markets requires that you broaden your perspectives, expand your global network and form powerful alliances. The Wealth Management Forum fuses these modern day essentials into an event where attendees gather insights from world-class experts, connect with accomplished colleagues, and join forces with specialist advisors.

Recent market conditions have forced even the wealthiest families to be more discerning when evaluating investment advice. Now, more than ever, family offices are looking for solutions they can trust to better protect their wealth and create a legacy for future generations.

The most successful family offices will be those who actively seek to re-define due diligence for the current conditions to ensure they are partnering with the best advisors and accessing the best investment products. In addition to investment advice, family offices are also seeking best practices for wealth preservation in order to achieve asset protection, minimization of risk, and eventual transition of wealth.

IFG's Wealth Management Forum provides a unique platform for single and multi-family offices to engage in vibrant benchmarking sessions and gain practical solutions and best practices to achieve optimal portfolio returns. The result? Two days of intense targeted networking sessions which will introduce you to new advisors whose services will enable future portfolio growth and asset protection.

Unparalleled Excellence

IFG gathers the leading minds in the field of wealth management to create an environment that promotes conceptual solutions for the dilemmas of tomorrow. Our strategy to personally invite each attendee allows a diverse group of handpicked executives to identify and discuss the most pressing issues in an environment that breeds knowledge sharing.

Job titles of attendees will include:

Chief Investment Officers, Presidents, and Managing Directors from Single and Multi-Family Offices and Select RIAs

2014 DISTINGUISHED SPEAKERS

Chairperson: Thomas Rogerson
Senior Managing Director and Family
Wealth Strategist
WILMINGTON TRUST

Hunter Wilson
Managing Director
WILMINGTON TRUST

Joe Calabrese
CEO
GELLER FAMILY OFFICE SERVICES

Christopher Pavese
Managing Director, CIO
BROYHILL FAMILY OFFICE

Harris Fried
CEO
THE FRIED FAMILY OFFICE

Carol Pepper
CEO and Founder
PEPPER INTERNATIONAL, LLC

Ira J. Perlmutter
Head of Family Office Direct Investing
T5 EQUITY PARTNERS, LLC

William E. Richards
Managing Director and Principal
BNR PARTNERS, LLC

Rob Lutts
Owner and CIO
CABOT WEALTH MANAGEMENT, INC.

Ravi Ugale
Director of Private Equity
GENSPRING FAMILY OFFICES

Matthew McCarthy
VP
NOTTINGHAM SPIRK

Michael P. Gayner
SVP
THE GAYNER GROUP

Arthur Cooper
COO
COOPER FAMILY OFFICE

Mark Castelin
Director and Senior Investment Advisor
CTC CONSULTING | HARRIS MYCFO

Michael Zeuner
Managing Partner
WE FAMILY OFFICES

David Beckwith
Managing Director and CIO
RINET COMPANY, LLC

Peter May
Owner
INDEPENDENT WEALTH ADVISOR

Jane Eigner Mintz, MA, LPC, BCPC, BRI-II, CFMI
Founder
REALIFE INTERVENTION SOLUTIONS, LLC

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THE EVENT SCHEDULE

IFG WEALTH MANAGEMENT FORUM

October 20-21, 2014, Palm Beach, FL
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KEY TOPICS

- Private Equity
- A New Risk Management Approach
- Alternative Investment Strategies
- A Review of the Fiduciary Standard
- Low Interest Rates
- The Burdens of Money on the Family
- Implementation of Family Governance Structure
- The Global Economy
- Strategic Outsourcing
- Impact Investing
- Systematic Portfolio Management
- Client Relationship and Communication

DAY ONE - MONDAY OCTOBER 20, 2014

8:00 FORUM REGISTRATION

9:15 IFG WELCOME

9:30 KEYNOTE PRESENTATION

FAMILY AND WEALTH SUSTAINABILITY FOR A LASTING LEGACY

Thomas Rogerson, Senior Managing Director and Family Wealth Strategist, WILMINGTON TRUST

Tom Rogerson's discussion "Family and Wealth Sustainability for a Lasting Legacy" will cover the concepts of family capital (human, intellectual, social and how successful families use their financial capital to enhance their non-financial assets. Wealth brings vast opportunities to families, but also vast challenges. Families wish to motivate children with wealth and to foster independence versus dependence, but often families are faced with children who feel privileged. The goal is to transfer values and purpose not just assets. In Tom Rogerson's presentation, he will show how a family can succeed through the development of communication around the family's values, interests, and circumstances. The outcome is a transition of the diversity of individuals and preferences, to unity of vision, to continuity of the family's total wealth. With an integrated family governance plan, the family is prepared to operate more efficiently and harmoniously over multiple generations.

10:15 PRESENTATION

EMERGING AND FRONTIER MARKET INVESTING: AFRICA AND INDIA - THE NEXT GROWTH LEADERS?

Rob Lutts, Owner and CIO, CABOT WEALTH MANAGEMENT, INC

This presentation will discuss how to successfully invest in markets which are so often overlooked. You will learn 15 Surprising Facts about India, power and infrastructure opportunities in these regions and investing in the emerging middle class to find steady growth.

11:00 NETWORKING BREAK

11:30 BUSINESS MEETINGS

1:00 LUNCH

2:00 PANEL DISCUSSION

PRIVATE EQUITY INVESTMENT STRATEGIES IN THE FAMILY OFFICE WORLD

Moderator: TBD

Harris Fried, CEO, THE FRIED FAMILY OFFICE

Ira J. Perlmutter, Head of Family Office Direct Investing, T5 EQUITY PARTNERS, LLC

Matthew McCarthy, VP, NOTTINGHAM SPIRK

Ravi Ugale, Director of Private Equity, GENSPRING FAMILY OFFICES

Attend this panel discussion to hear how to determine the value proposition for direct investing, what are key pitfalls to look out for and what are the anticipated benefits from this investment strategy. Our panelists will discuss as a Family Office, how to lay the groundwork for direct investing and how to manage the process with critical steps to make it happen. They will uncover where to source the best advisors, co-investors and other critical parties and inform how to source opportunities.

2:45 PRESENTATION

INVESTMENT CONSIDERATIONS FOR FRONTIER MARKETS

David Beckwith, Managing Director and CIO, RINET COMPANY, LLC

Attend this presentation and you can look forward to a discussion on the key differences between emerging and frontier markets. We will explore whether there is beauty in youth and whether frontier markets are worth the risk.

3:30 NETWORKING COFFEE BREAK

3:45 BUSINESS MEETINGS

5:45 PRESENTATION

CUT THROUGH THE CLUTTER: UNDERSTANDING THE FAMILY OFFICE LANDSCAPE

Michael Zeuner, Managing Partner, WE FAMILY OFFICES

Independent. Conflict-free. Family office. These buzz words are common place as new trends in wealth management take hold. With all the marketing noise, how is a family supposed to know with certainty what kind of adviser they are really working with? In recent months the term "Family Office" has become quite familiar - trendy, exclusive and so in demand that now large banks and brokerage firms are creating their own "family offices" to serve the ultra-high net worth niche market. The purpose of this discussion will be to shed some light on the family office industry - its beginnings, how the family office fits into the broader wealth management industry, various options for families when seeking a family office experience, costs to consider, and how these options compare to other wealth management options.

6:30 DUAL PRESENTATION

BURDENS OF MONEY ON THE FAMILY OFFICE

Jane Eigner Mintz, MA, LPC, BCPC, BRI-II, CFMI, Founder, REALIFE INTERVENTION SOLUTIONS, LLC

William E. Richards, Managing Director and Principal, BNR PARTNERS, LLC

7:15 NETWORKING RECEPTION

DAY TWO - TUESDAY OCTOBER 21, 2014

7:00 BREAKFAST

8:00 ROUNDTABLE DISCUSSION GROUP

ALTERNATIVE INVESTMENT STRATEGIES - WHERE ARE THOSE WITH BIG DOLLARS INVESTING IN THE COMING YEAR?

Arthur Cooper, COO, COOPER FAMILY OFFICE

The 2008 collapse and subsequent dislocations, together with the increased role of government in the financial markets, has forced those with assets to re-examine many of their underlying assumptions regarding alternative investments. This Roundtable will discuss how Family Offices are currently positioning themselves regarding such investments, with particular attention to hedge funds, private equity issues, and choice of alternatives.

8:00 ROUNDTABLE DISCUSSION GROUP

TBA

Hunter Wilson, Managing Director, WILMINGTON TRUST

8:00 ROUNDTABLE DISCUSSION GROUP

TBA

Peter May, Owner, INDEPENDENT WEALTH ADVISOR

8:45 KEYNOTE PRESENTATION

OUR LEADERSHIP MOMENT: WHY THE FIDUCIARY STANDARD MUST CONTINUE TO BE OUR INDUSTRY STANDARD

Joe Calabrese, CEO, GELLER FAMILY OFFICE SERVICES

The current regulatory review of standards that apply to investment professionals is a potentially watershed event for the wealth management industry and the clients we serve. As the SEC considers possible changes to both the Fiduciary Standard and Suitability Standard, the implications could lead to the most significant regulatory changes in decades. What are the potential implications for RIAs and Broker/Dealers? How might the investing public be better served by new standards? How will pending legislation impact our industry and practices? What will the cost of compliance be for firms? Joe Calabrese has followed the evolving debate on these questions with special interest given his unique role in serving clients in the high net worth sector and believes any dilution of the Fiduciary standard is not in the best interest of clients, our industry, or the economy.

9:30 NETWORKING COFFEE BREAK

9:45 BUSINESS MEETINGS

11:15 PRESENTATION

THE ROLE OF THE CHIEF INVESTMENT OFFICER IN A SINGLE FAMILY OFFICE - BEST PRACTICES AND FUTURE CHALLENGES

Carol Pepper, CEO and Founder, PEPPER INTERNATIONAL LLC

Single Family Offices face great challenges when organizing their investment process. Join Carol Pepper to learn about best practices in setting up the proper investment strategy to navigate today's turbulent marketplace. Review the best approach to setting up asset allocation, manager selection and consolidated reporting. Review innovative strategies used by top single family offices today, including family venture banking, multi-generational investing and co-investment.

12:00 PRESENTATION

PRIVATE EQUITY - DIRECT PRIVATE EQUITY INVESTING FOR FAMILIES; WHY, HOW, AND WHAT TO EXPECT

Ira J. Perlmutter, Head of Family Office Direct Investing, T5 EQUITY PARTNERS, LLC

This discussion will focus on why families should have a direct private equity investing strategy, the pros and cons, as well as how a family should think about setting up a platform to make such investments.

12:00 PRESENTATION

TBA

Christopher Pavese, Managing Director, CIO, BROYHILL FAMILY OFFICE

12:45 LUNCH

1:45 PRESENTATION

LOW INTEREST RATES - THE EFFECTS ON HEDGE FUNDS PERFORMANCE

Michael P. Gayner, SVP, THE GAYNER GROUP

Short credit could run as high as 10% which means that you could break even on your shorts and make 10% on your short investments. Not only are short credits reduced, but currently, many stocks bring a charge to borrow. In this presentation, Michael Gayner, SVP of the Gayner Group will discuss how low interest rates are hurting the performance of hedge funds.

2:30 NETWORKING COFFEE BREAK

2:45 BUSINESS MEETINGS

3:45 KEYNOTE PRESENTATION

SEVEN MANAGER SELECTION MISTAKES TO AVOID IN YOUR FAMILY OFFICE

Mark Castelin, Director and Senior Investment Advisor, CTC CONSULTING |

HARRIS MYCFO

Whether you already have an internal due diligence component to your family office or wonder whether you should have one, this presentation will cover some of the key elements to be aware of when managing or considering such an effort. Using experience gained from many years as a money manager research analyst, portfolio manager and consultant to ultra-high net worth clients, Mark will share what he has learned from the "school of hard knocks" and provide you with insights that will allow you to make more informed manager selection decisions.

4:30 CHAIRPERSON'S CLOSING COMMENTS

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This is a tentative schedule and is subject to change.

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Streamlining the Hiring Process

IFG has developed a unique formula for matching investment requirements from leading family offices with the services provided by highly specialized and requested wealth advisors.

Our method demands two dedicated research teams. Our Investor research team spends approximately six months researching with Family Offices to define very specific requirements for all attendees. At the same time, our highly experienced Advisor research team analyzes the market and determines the relevant Managers in each asset class. All Advisors must be fully qualified to attend the forum. The time we invest prior, means that your time onsite is maximized.

IFG allows an exclusive and limited number of firms to attend from the requested investment strategies and expertise.

The determining factors for admission are the type and number of requests from the attending Family Offices. Our current research has identified a keen interest in the following:

Advisory Services

- **Fiduciary Services**
- **Legal Services & Trusteeship**
- **Philanthropic Services**

Agriculture/Farmland Investments

Asset Management

- **Managed Futures & CTAs**
 - Systematic Trend Following
 - Discretionary
- **Consultants & Advisors**
- **Distressed**
- **Emerging Markets Strategies**
 - Russia
 - China
 - Latin America
- **Energy**
- **Equity Products**
 - Domestic
 - Emerging Markets
 - International
 - Global
- **Fixed Income Products**
- **Funds of Funds**
- **Hedge Funds**
- **Infrastructure**

Master Limited Partnerships (MLPs)

- **Mutual Funds**
- **Private Equity**
- **Real Estate**
 - Geographic Region of Interest
 - US West Coast
 - US East Coast
 - International
 - Emerging Markets
 - Strategy of Interest
 - Distressed
 - Core-plus
 - Value-added
 - Opportunistic

- **SMAs**
- **Socially Responsible Investing (SRI)**
- **Structured Products**
- **Venture Capital**
 - Life Sciences
 - Clean Technology
 - IT/Internet

Commodities

Insurance Products

- **Brokerage Services**
- **Personal**

Integrated Planning

- **Estate & Financial Planning**
- **Intergenerational Wealth Transfer**
- **Tax Planning & Consultancy**

Lifestyle Planning

- **Private Travel**
- **Property Management**

Software & Technology Solutions

- **Portfolio Management Technology**
- **Risk Management Solution & Services**
- **Wealth Management Consolidation Software**



PEER TALK

"Excellent forum for the exchange of ideas and information between investing leaders."
CEO, FORBES FAMILY TRUST

"I found all of the speakers very interesting in an industry that does not provide a lot of training. I really enjoyed the presentations on the operations and soft side of family offices."
Managing Partner, CFO TEAM - WINN FAMILY OFFICE

"This was a terrific collection of speakers discussing timely topics and useful info. The quality of attendees also made each networking opportunity meaningful"
Executive Vice President, ATLAS BROWN INC

"The IFG Wealth Management Forum provides an excellent opportunity for families and advisors to learn the latest and best approaches to investment, risk mitigation and family governance to become better informed on the legislative and regulatory challenges that could affect future investors."
President and CEO, POLICY AND TAXATION GROUP

"The gathering of such great talent in one place provides for a great opportunity to learn and grow!"
Managing Principal, COMPASS FINANCIAL GROUP

"A fantastic event! The group was intimate and fostered deep knowledge sharing"
Senior Vice President, Regional Manager, U.S. BANK - PRIVATE CLIENT RESERVE

"This was one of the best-run events that I have been to. The takeaway value is directly related to how much you put into it. I found the business meetings and networking events to be extremely valuable."
Managing Director, CHESS FINANCIAL

OUR HOTEL PARTNER

At five-star Four Seasons Resort Palm Beach, Florida, immerse yourself in a chic and classic Florida resort where your every desire for a tropical escape will be met. Nestled in an expansive beach of silken sand, the intimately sized Four Seasons Resort presents an oasis of laidback sophistication amid calm ocean waters. Enjoy the intimate size ideal for networking or recognition, along with resourceful, thoughtful, award-winning care that goes above and beyond to ensure the success of every meeting.

For more information, please visit:

www.fourseasons.com/palmbeach

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