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Connections • Relationships • Results

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# Strategic Investments Sector Meeting
# Family Office/Private Wealth Track

Hyatt at the Bellevue | Philadelphia, PA | May 20-22, 2012

| SUNDAY May 20th 2012 | |
|---|---|
| 11.00 am – 1:00 pm | **Registration** |
| 1:00 pm – 1:05 pm | **Chairman's Opening Remarks** |
| 1.05pm – 1.45pm | **KEYNOTE PRESENTATION**<br><br>**Family Office Industry Outlook – A View into Legal and Demographic Trends**<br><br>**Joe Calabrese**<br>President<br>**Harris myCFO** |
| 1.45pm – 2.30pm | **JOINT PRESENTATION**<br><br>**Sustaining the Family Enterprise through Sound Governance**<br><br>**Dirk Jungé**<br>Chairman and CEO<br>**Pitcairn Family Office**<br><br>**Ann Dugan**<br>Founder, Institute for Entrepreneurial Excellence<br>**Katz Graduate School of Business, University of Pittsburgh** |
| 2.30pm – 3.30pm | **THINK TANK**<br><br>**Objectives Based Portfolio Design**<br><br>**Ted Cronin**<br>Chief Executive and Chief Investment Officer<br>**Manchester Capital Management LLC** |
| 3.30pm – 4.15pm | **Estate Tax Reform in the Age of Deficit Reduction**<br><br>**Jeff Cook**<br>President and CEO<br>**Policy and Taxation Group** |
| 4.15pm – 4.30pm | **Networking Break** |
| 4.30pm – 5:30pm | **THINK TANK**<br><br>**Insights in the Distressed Mortgage Arena**<br><br>**Robert Bernstein**<br>Founder, Managing Member and CEO<br>**Prism Family Office** |

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| 5.30pm –6:15 pm | | **JOINT PRESENTATION**<br><br>**Understanding the Ultimate Client**<br><br>**Allan Zachariah**<br>Co-Founder and Managing Director<br>**Pathstone Family Office**<br><br>**Anna Nichols**<br>Managing Director, Content Development<br>**Family Office Exchange** |
| 6.15pm – 7.00pm | | **Tax Aware Investing – Maximizing the Benefits of Tax Strategies**<br><br>**Barbara Raasch**<br>Principal and Founding Member<br>**RCL Advisors** |
| 7.00pm – 10.00pm | | **Cocktails & Dinner** |

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| **MONDAY, May 21st, 2012** | | |
|---|---|---|
| 7:00 am – 8:00 am | | **Breakfast** |
| 8.00am – 8.45am | | **KEYNOTE PRESENTATION**<br><br>**What's Next: Transforming The Modern Family Office**<br><br>**Charles Lowenhaupt**<br>Chairman and CEO<br>**Lowenhaupt Global Advisors** |
| 8.45am – 9.30am | | **PANEL DISCUSSION**<br><br>**When Good Investments go Wrong**<br>Approaches to Managing and Recovering your Money<br><br>**Carol Pepper**<br>CEO and Founder<br>**Pepper International**<br><br>**Dirk Jungé**<br>Chairman and CEO<br>**Pitcairn Family Office**<br><br>**TBA**<br>TBA<br>**Forensic Accountant**<br><br>**TBA**<br>TBA<br>**Attorney** |
| 9.30am – 10.30am | | **THINK TANK** |
| | | **The Role of Commodity Trading Advisors in an Asset Allocation**<br><br>**Jeffrey Tumolo**<br>Managing Director and Chief Investment Strategist<br>**TAG Associates, LLC** |
| 10.30am – 10.45am | | **Networking Break** |
| 10.45am – 11.30am | | **Exactly WHO Am I Giving My Money To?**<br><br>**Kermit Claytor**<br>Founder/Principal<br>**Kings Mountain Capital Group** |
| 11.30am – 12.15pm | | **Manager Due Diligence in the New Normal: Crossing Your T's and Dotting Your I's**<br><br>**Chris Battifarano**<br>Portfolio Strategist<br>**GenSpring Family Office** |

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| | |
|---|---|
| 12.15pm – 1.15pm | **THINK TANK** |
| | **The Evolution of Hedge Funds in a Family Portfolio**<br><br>**Jonathan Barbato**<br>Director of Manager Selection<br>**Geller Family Office Services LLC** |
| 1.15pm -2.30pm | **Lunch** |
| 2.30pm – 3.15pm | **Asset Allocation for the Very Wealthy in Uncertain Times**<br><br>**John LaPann**<br>President and Chief Investment Officer<br>**Federal Street Advisors** |
| 3.15pm – 4.00pm | **A “Risk First” Paradigm for the “New Market Realities”**<br><br>**Mitchell Eichen**<br>Founder and CEO<br>**The MDE Group** |
| 4.15pm - 4.30pm | **Networking Break** |
| 4.30pm – 5.30pm | **THINK TANK** |
| | **Managing Risk in a Family Portfolio**<br><br>**Joe Calabrese**<br>President<br>**Harris myCFO** |
| 5.30pm – 6.15pm | **Balancing Hedge Funds, Private Equity and Liquidity in a Family Portfolio**<br><br>**Charles Krusen**<br>Chief Investment Officer<br>**Krusen Family Office** |
| 6.15pm – 7.00pm | **Managing Portfolio Risk in a Volatile Marketplace**<br><br>**Jack Ablin**<br>Chief Investment Officer<br>**BMO-Harris Private Bank** |
| 7.00pm – 10.00pm | **Cocktail Reception & Dinner** |

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# *Strategic Investments Sector Meeting*
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Hyatt at the Bellevue | Philadelphia, PA | May 20-22, 2012

| TUESDAY, May 22nd, 2012 | |
|---|---|
| 7:00 am – 8.00 am | **Breakfast** |
| 8.00am – 8.45am | **JOINT PRESENTATION**<br><br>**Sustaining Wealth through the Generations**<br><br>**John "Jack" Garniewski Jr.**<br>Senior Managing Director, Wealth Advisory Services, Family Wealth Team<br>**Wilmington Trust**<br><br>**Thomas Rogerson**<br>Senior Managing Director and Family Wealth Strategist<br>**Wilmington Trust** |
| 8.45am – 9.30am | **EMERGING MARKETS INVESTMENT OUTLOOK**<br><br>The Death of Decoupling<br><br>**Christopher Pavese**<br>Chief Investment Officer<br>**Broyhill Asset Management** |
| 9.30am – 10.30am | **THINK TANK**<br><br>**Hedging Inflation Tail Risk - Commodities & Other Strategies**<br><br>**Michael Dubin**<br>Managing Director<br>**Silvercrest Asset Management** |
| 10.30am – 10.45am | **Networking Break** |
| 10.45am – 11.30am | **Generating Hoped-For Returns in a Sluggish Economy**<br><br>**Dr. Matthew Gelfand**<br>Managing Director, Senior Economist and Senior Investment Advisor<br>**Rockefeller Financial** |
| 11.30am – 12.15pm | **The Importance of Hedged Strategies in a Family's Portfolio**<br><br>**Dorothy Collins Weaver**<br>Co-Founder and CEO<br>**Collins Capital** |
| 12.15pm - 1.00pm | **Sustainable Investing Strategies: Why Investor Interest Continues To Grow**<br><br>**Patricia Farrar-Rivas**<br>CEO<br>**Veris Wealth Partners** |
| 1.00pm | **Lunch and End of Meeting** |