A Special Thanks to Our Advisory Board:

Tavan Pechet, President, POINT ADVISORS (SFO)
Gordon Grant Curtis, Director, CI INVESTMENTS (SFO)
Candice Beaumont, Managing Director, L INVESTMENTS (SFO)
Renato Alessandro Iregui, Principal, RAIRE FAMILY OFFICE (SFO)
Kai Tao, Managing Member, PARK ONE CAPITAL (SFO)
Ken Wittenberg, Chief Investment Officer, ASCENT FAMILY GROUP (SFO)
Richard Masino, Chief Investment Officer, MASINO FAMILY OFFICE (SFO)
Nicole Rothschild, Chief Investment Officer, ROTHSCHILD FAMILY OFFICE (SFO)
Jimmy Hickey, Chief Investment Officer, OSBORNE SIEGEL PRIVATE FAMILY OFFICE (SFO)
Brett Rubinson, Partner, VERITABLE, LP (MFO)
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Christopher Fineburg, CFA, Director, GREYCOURT & CO., INC. (MFO)
Rick McDonald, Managing Partner, U.S. ADVISORY GROUP (MFO)
Steen Ehlern, Managing Director, FERGUSON PARTNERS FAMILY OFFICE (MFO)
Allan Zachariah, Managing Director, PATHSTONE FAMILY OFFICE (MFO)
Christopher C. Chandler, CFA, CAIA, Senior Investment Partner, GENSPRING FAMILY OFFICES (MFO)
James Rosebush, Chairman, THE WEALTH & FAMILY MANAGEMENT GROUP
Sharath Sury, Dean's Executive Professor of Finance, Executive Director, SIFIRM, SANTA CLARA UNIVERSITY
Natasha Pearl, Partner, ASTON PEARL
Linda Mack, President, MACK INTERNATIONAL, LLC
Kathy Boyle, CFP, President, CHAPIN HILL ADVISORS, INC
Jeremy Tennenbaum, CEO, SPOUTING ROCK CONSULTING
Lisa Gray, Managing Member, GRAYMATTER STRATEGIES, LLC
Michael Pompian, Director of Private Wealth Consulting, HAMMOND ASSOCIATES/MERCER
Thomas Handler, Chair of Advanced Planning and Family Office Practice Group, HANDLER THAYER, LLP
John P.C. Duncan, Esq., Partner, DUNCAN ASSOCIATES, ATTORNEYS AND COUNSELORS, P.C.

Monday, July 18, 2011

8:00 am		**AMERICA'S CUP SAILBOAT REGATTA** **Sponsors include:** **PHILADELPHIA FINANCIAL** **CITI CROSS ASSET GROUP** **AMARACH GROUP LLC** **JOJO INTERNATIONAL LLC / MARCELLUS PARTNERS LP** **WELTON INVESTMENT CORPORATION**
8:00 am – 12:00 pm		**Exhibit Set-up**
11:00 am	Exhibits Open	**Registration**
12:10 pm - 12:20 pm		**Co-Chair Opening Remarks** **Lisa Gray, Managing Member, GRAYMATTER STRATEGIES, LLC** **Linda Mack, President, MACK INTERNATIONAL, LLC** **Michael Pompian, Director of Private Wealth Consulting, HAMMOND ASSOCIATES/MERCER**
12:20 pm - 12:40 pm		**Philip Lotz, CEO and Chairman, JUNIPERUS CAPITAL LTD.**
12:40 pm - 1:00 pm		

		Bo Wilkins, Partner, NEASE, LAGANA, EDEN & CULLEY (NLEC)
1:00 pm – 2:00 pm		**The "Dodd Frank Act": A new paradigm for family offices** This panel will review the most current SEC decisions defining family offices. Panelists will discuss the options available to non-exempt family offices under the new legislation and the challenges and impact of making those changes. Discussions will include taking an office through the process of registering, chartering or opening the office doors to new clients as well as the fiduciary risk that may be created by making changes to their operating structure. Finally we will touch on best practices and mitigation techniques for managing such risk. Speakers: **Maria Treglia, Senior Vice President, Professional Liability, HUB INTERNATIONAL** **David Guin, Partner, WITHERS BERGMAN** **Lacey Pevey, VP Financial Institutions, CHARTIS INSURANCE** **Christine Galloway, President and CEO, OKABENA COMPANY (MFO)**
2:00 pm - 3:00 pm		**Investment Styles and Strategies for Family Offices: the good, the bad and the ugly.** • Passive investing is the low cost style to allocating capital – is it a bargain or do you get what you pay for? • Private equity & hedge funds are the polar opposite to the passive investment style -- is the asymmetrical compensation structure worth it? • Is Socially Responsible Investing a prudent strategy or is it merely a marketing pitch to tap into human emotions? • Under the radar alternative investment strategies that have a compelling risk/reward profile. • Best idea for the next 12 months. Moderator: **Richard Masino, Chief Investment Officer, MASINO FAMILY OFFICE (SFO)** Panelists: **Uri Landesman, President, PLATINUM PARTNERS** **Alex Sloane, President, A.J. SLOANE & COMPANY, INC.** **Pete Vloedman, CEO, ANCHOR RISK ADVISORS** **Gordon Jones, Managing Partner & President, TIMBERVEST**
3:00 pm – 3:15 pm		**Afternoon Refreshment Break** Sponsored by:
3:15 pm – 4:15 pm		**Asset Allocation: Trends and Drivers in a Changing Environment** • Asset allocation strategies for family offices • Evolving challenges to tax efficient portfolio construction • Strategic versus tactical allocations • The role of alternative investments • Defining and measuring risk in portfolios Moderator: **Christopher C. Chandler, CFA, CAIA, Senior Investment Partner, GENSPRING FAMILY OFFICES (MFO)** Panelists: **Kristen Bitterly, Director of Americas Mega Wealth Sales, CITI CROSS ASSET GROUP** **Theresa Patti, Managing Director, Senior Portfolio Strategist, QFS ASSET MANAGEMENT, LP** **John L. Steffans, Founder, SPRING MOUNTAIN CAPITAL** **TBA, PRAESIDEO MANAGEMENT**

4:15 pm – 5:15 pm		**Manager Selection; What should family offices be looking for when selecting managers?** • Alpha vs. Beta: How to identify managers who truly add value. • Quantitative vs. Qualitative methods of due diligence • Operational Due Diligence • Manager Risk: What are the components of risk and how do you identify them? Moderator: **Sharath Sury, Dean's Executive Professor of Finance, Executive Director, SIFIRM, SANTA CLARA UNIVERSITY** Panelists: **Annie Erner, Portfolio Manager, P.A.W. CAPITAL PARTNERS L.P.** **Ted Mocarski, Founder & Senior Managing Director, BANK STREET CAPITAL PARTNERS** **TBA, FALCON POINT CAPITAL, LLC** **TBA, ATRATO ADVISORS LLC**
5:15 pm – 6:15 pm		**Equity Investing – The latest thinking on Current Topics of Interest: Should investors be focused on dividends and total return in their equity portfolios?** • How should investors get equity exposure to the growth in emerging markets economies? • What is Fundamental Indexing and why should investors be considering it versus cap weighted indexing? • Should investors be considering low volatility equity strategies? • What are the key issues to consider when investing in Frontier Markets? Moderator: **Michael Pompian, Director of Private Wealth Consulting, HAMMOND ASSOCIATES/MERCER** Panelists: **Joseph Farley, Managing Member, KELVINGROVE PARTNERS, LLC** **William Noonan, President & CEO, CONTRAVISORY INVESTMENT MANAGEMENT** **Kevin Divney, Founder, BEACONCREST CAPITAL MANAGEMENT** **TBA ,OPUS POINT PARTNERS**
6:15 pm – 7:15 pm		**Cocktail Reception** Sponsored by: **Beverage Sponsor:** **NARRAGANSETT BREWING COMPANY**

Tuesday, July 19, 2011

7:30 am – 8:30 am	Exhibits Open	**Continental Breakfast** Sponsored by:
7:30 am – 8:30 am		**Private Closed Door Breakfast Roundtable Part 1: "Structuring a Family office" Family Office And Multi –Family Offices ONLY** This private, closed-door session will be organized for foundations, family offices, multi-family offices, and accredited high-net worth individuals to address issues these organizations/individuals endure day-to-day. Two family office members will lead the panel in discussions on areas of specific concern. **No managers will be allowed in the session, no exceptions.** Facilitators: **Lisa Gray, Managing Member, GRAYMATTER STRATEGIES, LLC** **Linda Mack, President, MACK INTERNATIONAL, LLC**

<table>
<tr><td>8:30 am – 8:35 am</td><td rowspan="5"></td><td colspan="2">Opening Remarks</td></tr>
<tr><td>8:35 am – 8:55am</td><td colspan="2">Juan Carlos Artigas, Investment Research Manager, WORLD GOLD COUNCIL</td></tr>
<tr><td>8:55 am – 9:15 am</td><td colspan="2">TBA, OLD MUTUAL ASSET MANAGEMENT</td></tr>
<tr><td>Tracks</td><td>Track 1</td><td>Track 2</td></tr>
<tr><td>9:15 am – 10:15 am</td><td>Opportunities for Investing in Real Assets

Moderator:
Steen Ehlern, Managing Director, FERGUSON PARTNERS FAMILY OFFICE (MFO)

Panelists:
Andy Hoffman, Portfolio Manager, PIMCO
TBA, BROADWAY DIRECT INVESTMENTS
TBA, SHINNECOCK PARTNERS
TBA, SNYDER KEARNEY, LLC</td><td>Private Equity Fast Track Wealth Strategies
• Direct vs. Co Investment
• Recurring Revenue and/or Asset Accumulation
• Longer Term Safety vs. Short Term Liquidity
• Overhead Expense of Private vs. Public
• Growth Potential--Private vs. Public

Moderator:
Gordon Grant Curtis, Director, CI INVESTMENTS (SFO)

Panelists:
Josh Paulson, Founding Partner, P2 CAPITAL PARTNERS, LLC
Dayton Carr, Founder, VCFA GROUP
Alan Donenfeld, Partner, PARAGON CAPITAL LP
TBA, VIVARIS, LTD.</td></tr>
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10:15 am – 11:15 am		**Managed Futures vs. Direct Investments in Commodities - Risks vs. Rewards of each** • How do you choose a manager? • What are internal costs? • How does a rising interest rate environment affect the return and leverage used? • How do you decide on the appropriate allocation? • How different are various funds? • Long vs. short and who adjusts when and how? Moderator: **Kathy Boyle, CFP, President, CHAPIN HILL ADVISORS, INC** Panelists: **David Rothberg, Chairman and Chief Investment Officer, NIAGARA CAPITAL PARTNERS LTD.** **Mark Kuper, COO, TELLURIDE ASSET MANAGEMENT, LLC** **Paul Kim, CEO/Head Trader, MISFIT FINANCIAL GROUP LLC** **TBA, EAM PARTNERS LP**	**Energy: Investment Opportunities and Challenges in Global Energy Markets** • Global Energy Price Projections and Is Peak Oil a Reality • Impact of New Drilling Technologies and Shale Gas • Opportunities in the Global Energy Infrastructure Build-Out • Impact of Rising Energy Costs on the Global Economy • Effective Risk Management in Turbulent Energy Markets Moderator: **Candice Beaumont, Managing Director, L INVESTMENTS (SFO)** Panelists: **John MacWilliams, Partner, TREMONT ENERGY PARTNERS, LLC** **TBA, FIS GROUP** **TBA, TALARA CAPITAL MANAGEMENT** **TBA, RAB CAPITAL**
11:15 am – 11:30 am		**Refreshment Break** Sponsored by:	

11:30am - 12:30 pm	Exhibits Open	**Beyond REO chaos: REO as Real Estate Optimization.** • Where REO outperforms all benchmarks. • Have sustainability premiums been priced into new construction and out of renewal rates. • How much of investment grade stock is up for renewal in the next 3 to 5 years? • Which discounted assets or markets will outperform their premium classes? • How to avoid the class B bomb or class C catastrophe. • What leverage is the Real Estate allocation expected to have on a balanced portfolio? Will it be a stabilizer or catalyst for abnormal returns? • How will inflation affect assorted asset groups? • Differentiate premiums and discounts to property classes -i.e. core commercial, industrial, resort, extended stay. Moderator: **Renato Alessandro Iregui, Principal, RAIRE FAMILY OFFICE (SFO)** Panelists: **Bob Sipple, COO, LIGHTHOUSE REALTY FUND LP** **Peter Palandjian, Chairman & CEO, INTERCONTINENTAL REAL ESTATE** **Garrett Tripp, CFA, Senior Portfolio Manager, BRADDOCK FINANCIAL CORPORATION** **Gary Linhart, Managing Director & Principal, VIAWEST GROUP**	**Investing in Credit Through the Cycle:** • Where are we in the cycle? • Which credit strategy(ies) (investment grade, high yield, passive distressed credit investing, and distressed for control) should yield the best returns at this point? • How would a rise in Treasury yields effect your portfolio? • Given that companies are able to issue low cost, long tenor debt why should an investor allocate to high yield credit versus equities? • With a low default rate, what other opportunities are you investing in outside of bankruptcies • How larges it he is the "wall of maturities" and can it be fixed without the return of a robust CLO market • Are you looking for opportunities outside of the U.S. Moderator: **Brett Rubinson, Partner, VERITABLE, LP (MFO)** Panelists: **Dennison T. Veru, Executive Vice President & Co-Chief Investment Officer, PALISADE CAPITAL MANAGEMENT, L.L.C.** **Jeffrey Huge, Director, Senior Portfolio Manager, MORGAN STANLEY SMITH BARNEY** **TBA, DDJ CAPITAL MANAGEMENT, LLC** **TBA, CANDLEWOOD INVESTMENT GROUP**

12:30 pm – 1:30 pm		**Outlook for Investing in Emerging Markets** • Frontier market investing • Beyond BRICs investing Moderator: **Rick Pitcairn, II, Chief Investment Officer, PITCAIRN (MFO)** Panelists: **TBA, FOXHALL CAPITAL MANAGEMENT** **Michael J. O'Flynn, Managing Director , UFG ASSET MANAGEMENT** **Frank Barbera, Executive Vice President, SIERRA INVESTMENT MANAGEMENT** **TBA, DUPONT CAPITAL MANAGEMENT**	**The Case for Strategic Life Insurance Planning** Moderator: **Michael Brink, Principal, PELAGOS ADVISORS** Panelists: **Robert J Hebron, Sr Vice President Advanced Market Network, NEW YORK LIFE INSURANCE COMPANY** **Thomas M. Bounty, J.D., Managing Director, MASSMUTUAL FINANCIAL GROUP** **John Hillman, President & CEO, PHILADELPHIA FINANCIAL**
1:30 pm – 2:45 pm		**Luncheon** **"WHAT'S NEXT FOR THE AMERICAN ECONOMY?"** **KEYNOTE SPEAKER:** **Professor Martin Feldstein, Board Member,** **PRESIDENT OBAMA'S ECONOMIC RECOVERY ADVISORY BOARD,** **George F. Baker Professor of Economics,** **HARVARD UNIVERSITY**	
2:45 pm – 3:45 pm		**Fixed Income - In Search of Yield and Diversification** • Alternatives to municipal bonds during credit and interest rate uncertainty • Traditional core bond portfolios • Broad structured credit and mortgages • Small and middle market corporate finance opportunities Moderator: **Christopher Fineburg, CFA, Director, GREYCOURT & CO., INC. (MFO)** Panelists: **Amin Majidi, Chief Risk Officer, PREMIUM POINT INVESTMENTS** **TBA, ROCKIT SOLUTIONS, LLC** **TBA, HUNTING DOG CAPITAL, LLC** **TBA, CUTWATER ASSET MANAGEMENT**	**The Return of Life Settlements and More… Why are the best credit funds now investing in the life and longevity market?** • What is the investment opportunity? How do we invest? Why should we invest? • Why did the market blow up in 2008? • What about the headline risk of investing in this asset class? Moderator: **Jimmy Hickey, Chief Investment Officer, OSBORNE SIEGEL PRIVATE FAMILY OFFICE (SFO)** Panelists: **W. Massie Meredith, Jr., Chief Executive Officer, ALPHALIFE FUNDS GROUP**

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<tr>
<td>3:45 pm – 4:45 pm</td>
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<td>Hedge Funds – The New Era
Role in a family portfolio
Warning signs and red flags
Liquidity, leverage and other risks
Trends in operational due diligence
Negotiating legal and financial terms
Portfolio construction and risk management
Searching for returns
Moderator:
Tavan Pechet, President, POINT ADVISORS (SFO)

Panelists:
John Beaman, Claros Portfolio Manager, AREA PROPERTY PARTNERS
Parag Vora, Portfolio Manager & Founding Partner, HG VORA CAPITAL MANAGEMENT, LLC
TBA PHALANX CAPITAL MANAGEMENT, LLC
TBA, DOUBLOON CAPITAL</td>
<td>21st Century family Office Caliber Advanced Tax & estate Planning
The Wealth Squad – an unprecedented new level of IRS scrutiny
The new tax laws and cases – how to benefit from them
The most impactful and Advanced Wealth Transfer Strategies
Income Tax planning in the current and evolving environment
International structures, strategies and reporting
Moderator:
Thomas Handler, Chair of Advanced Planning and Family Office Practice Group, HANDLER THAYER, LLP

Panelists:
Patrick Geddes, Chief Investment Officer and Partner, APERIO GROUP LLC</td>
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<tr>
<td>4:45 pm – 5:00 pm</td>
<td></td>
<td colspan="2">Refreshment Break
Sponsored by:</td>
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<tr>
<td>5:00 pm – 6:00 pm</td>
<td></td>
<td>Investing in Alternatives
How to approach alternative investing in cyclical/commodity industries?
Financial engineering through trading and hedging techniques – is it really an alternative any more?
Innovations that solve global problems on a large scale have potential for high ROI, but can be risky. How can the risks be mitigated?
What's broken and what works in venture capital models?
Moderator:
Kai Tao, Managing Member, PARK ONE CAPITAL (SFO)

Panelists:
Justin Hall-Tipping, CEO, NANOHOLDINGS, LLC
George McCormick, Managing Partner, TPH PARTNERS
TBA, FORWARD MANAGEMENT LLC
TBA, LOUIS DREYFUS HIGHBRIDGE ENERGY CAPITAL MANAGEMENT</td>
<td>Protect, Defend and Above All, Preserve: Cutting Edge Strategies for Asset Protection
Asset Protection Steps Every Family Should Take, Starting Tomorrow
Traditional Concerns: Divorce, Debt, Lawsuits
New Vulnerabilities to Consider: Health, Security, Private Staff, Family Governance
Linkage Between Asset Protection and Estate Planning
Benefits of a Proactive Focus on Prevention vs. Seeking the Cure
Moderator:
Natasha Pearl, CEO and Founder, ASTON PEARL

Panelists:
TBA, BARING ASSET MANAGEMENT</td>
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6:00 pm – 6:45 pm		**Best practices for picking Fund of Hedge Fund** • How do you manage risk on the down side? • Is the prior tack record representative of the current portfolio? • How can a fund of hedge funds demonstrate their due diligence? • What happens to a fund that loses their chief investment office? • Is there a real advantage to size? Moderator: **Ken Wittenberg, Chief Investment Officer, ASCENT FAMILY GROUP (SFO)** **Panelists:**	**Philanthropic Strategies: Defining Absolute Return: "*We make a living by what we earn; we make a life by what we give. - Churchill*"** • What is the best philanthropic structure: foundation, personal giving, community foundation, donor advised fund? • How do we hold the donee organization to a specific ROI? • Is there value in engaging family members in philanthropy? • Anonymous or credited giving: its impact on reputational management? • How do I establish a mission statement and adhere to this? Moderator: **James Rosebush, Chairman, THE WEALTH & FAMILY MANAGEMENT GROUP** Panelists: **Joan Sharp, CFP®, ChFC, CAP, MSFS, Founder, LIFE STRATEGIES, LLC**
6:45 pm – 8:00 pm		**Cocktail Reception** Sponsored by: **Beverage Sponsor:** **NARRAGANSETT BREWING COMPANY**	

Wednesday, July 20, 2011

8:15 am – 9:15 am	Exhibits Open	**Continental Breakfast** Sponsored by: **AMERICAN PRECIOUS METALS EXCHANGE INC.**
8:15 am – 9:15 am		**Private Closed Door Breakfast Roundtable Part 2: "Managing Risk in the Entire Family Wealth Portfolio"** **Family Office And Multi –Family Offices ONLY** This private, closed-door session will be organized for foundations, family offices, multi-family offices, and accredited high-net worth individuals to address issues these organizations/individuals endure day-to-day. Two family office members will lead the panel in discussions on areas of specific concern. **No managers will be allowed in the session, no exceptions.** Facilitators: **Lisa Gray, Managing Member, GRAYMATTER STRATEGIES, LLC** **Linda Mack, President, MACK INTERNATIONAL, LLC**
9:15 am – 9:20 am		**Welcoming Remarks**
9:20 am – 9:40 am		**Peter Petas, President & Founder, CREDITSIGHTS, INC.**
9:40 am – 10:00am		**TBA, AMERICAN PRECIOUS METALS EXCHANGE INC.**

10:00 am – 10:45 am		**Risk Management: One size does not fit all** • **Investing:** While there is agreement that risk management is important, there is no one right way to identify, manage and monitor risk in portfolio management. Panelists will share insights, opinions and different schools of thought on due diligence considerations as relates to some different investment strategies. • **From enterprise to single family member risk:** A family office can find itself exposed to operational related risks as well as unexpected risks due to the action, or lack of action, by just one family member. Panelists will identify some of these risks and offer tips for preventing, correcting or diffusing the situation. Moderator: **Nicole Rothschild, Chief Investment Officer, ROTHSCHILD FAMILY OFFICE (SFO)** Panelists: **Theodore J. Lucas, Managing Partner, LATTICE STRATEGIES LLC** **Robert Bastone, Chief Operating Officer and Chief Compliance Officer, SPRUCE PRIVATE INVESTORS** **David Vogel, Chief Scientist, VOLORIDGE INVESTMENT MANAGEMENT**
10:45 am – 11:30am		**Sustainable Family Wealth – Gone in 3 Generations** • **The Successful Family *Strive, Thrive, Survive and Demise* Lifecycle** • **Family Sustainable *Structure*** • **Management of the Family Wealth – *Human Capital and Financial Capital*** • **The 3 Big Questions:** ♦ **How Much is Enough?** ♦ **When Do You tell Them?** ♦ **How do you prepare Them?** Moderator: **Rick McDonald, Managing Partner, U.S. ADVISORY GROUP (MFO)** Panelists:
11:30 am – 12:15am		**Safe Harbors in a Regulated World? Private Trust Company, SFO, Outsourced Advisors/Trustees and Other Options** • Do any of these provide safe harbors from SEC regulation, traumatic family and trustee successions and trust taxation? • How do they compare in helping families stay together and pursue their goals over generations? • What are the relative burdens and expense of each approach? For whom is each most appropriate? • Which provide the best investment and operational risk management? • Which are best at democratizing wealth management within a family? Moderator: **John P.C. Duncan, Esq., Partner, DUNCAN ASSOCIATES, ATTORNEYS AND COUNSELORS, P.C.** Panelists: **Carol Pepper, President, PEPPER INTERNATIONAL (MFO)**

12:15 am – 1:00pm		**Consultant Roundtable: You can't create trust out of thin air: why people need help selecting wealth advisors** • How can we get beyond asking our brothers-in-law for a recommendation or giving our wealth to our fraternity brothers to manage? • Before we ask a single question of a prospective wealth advisor, we need to answer a lot of questions about ourselves. What kind of investors are we, what are we and our families like as people, what are our goals, what kind of customer are we likely to be, etc. • There are thousands of advisors out there which can make the task seem daunting. How can people smoothly and efficiently winnow down the number of names • What kinds of questions should we ask advisors? Can we ask them ourselves, or do we need consultants to help us ask the questions? Moderator: **Jeremy Tennenbaum, CEO, SPOUTING ROCK CONSULTING** Panelists: **Freeman Wood, Director, MERCER SENTINEL GROUP** **Bill McVay, Managing Partner, RDK STRATEGIES**
1:00 pm		**Closing Remarks**

Participants:

Deva Panambur, Founder, **SARSI LLC**
John Roche, CEO, **THE FLATLEY COMPANY (SFO)**
Neil Mehta, Director, **GREENOAKS CAPITAL MANAGEMENT LLC (SFO)**
Nitin Mehta, Director, **GREENOAKS CAPITAL MANAGEMENT LLC (SFO)**
Joshua Olshin, Executive/General Counsel, **YELLOW BRICK CAPITAL ADVISERS (UK) LIMITED (MFO)**
Guy-Max Delphin, Investment Strategist, **YALE-NEW HAVEN HEALTH**
Nazneen Kanga, Principal, **DOSHI CAPITAL PARTNERS (SFO)**
Debra Masino, Family Member/Partner, **MASINO FAMILY OFFICE (SFO)**
Richard Masino, Chief Investment Officer, **MASINO FAMILY OFFICE (SFO)**
Ken Wiittenberg, Chief Investment Officer, **ASCENT FAMILY GROUP (SFO)**
Gordon Grant Curtis, Director, **CI INVESTMENTS (SFO)**
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Michael Pompian, Director of Private Wealth Consulting, **HAMMOND ASSOCIATES/MERCER**
Kathy Boyle, CFP, President, **CHAPIN HILL ADVISORS, INC**

Jackie Kazantzis, Director of Strategic Planning, **CHAPIN HILL ADVISORS, INC**
Gene Miller, President, **GALAXY FAMILY RESOURCES, LLC**
Jay Jackson, Head of Alternative Investments, **OSBORNE SIEGEL PRIVATE FAMILY OFFICE (SFO)**
Jimmy Hickey, Chief Investment Officer, **OSBORNE SIEGEL PRIVATE FAMILY OFFICE (SFO)**
Megan Sterrett, Investment Associate, **DOSHI CAPITAL PARTNERS (SFO)**
Kai Tao, Managing Member, **PARK ONE CAPITAL (SFO)**
James Rosebush, Chairman, **THE WEALTH & FAMILY MANAGEMENT GROUP**
Sander Doucette, Investment Associate, **HILLVIEW CAPITAL ADVISORS, LLC**
Andrew Parrillo, President, **NEWPORT CAPITAL ADVISORS**
Jeremy Tennenbaum, CEO, **SPOUTING ROCK CONSULTING**
Erich Hickey, President, **SPOUTING ROCK CONSULTING**
Thomas Quinn, Director of Research, **SPOUTING ROCK CONSULTING**
Candice Beaumont, Managing Director, **L INVESTMENTS (SFO)**
Ira Rapport, Managing Member / CEO, **NEW ENGLAND PRIVATE WEALTH ADVISORS**
Aviva Pinto, Managing Director, **HILLVIEW CAPITAL ADVISORS (MFO)**
Jonathan Hochberg, President, **HILLVIEW CAPITAL ADVISORS (MFO)**
Juan Meyer, Executive Vice President, **GENSPRING FAMILY OFFICES, LLC (MFO)**
Rachel Warren, Managing Director, **WARREN ADVISORY GROUP**
Rui Mendez, Managing Director, **WARREN ADVISORY GROUP**
Matthew MacLachlan, Senior Operations Associate, **NEW ENGLAND PRIVATE WEALTH ADVISORS, LLC**
Ari Moses, Director of Investments, **FISHER BROTHERS OPERATING (SFO)**
Kenneth Russell, President, Greenwich Family Office, **GENSPRING FAMILY OFFICES (MFO)**
Brad Scholtz, Vice President, **RICHARD L. SCOTT INVESTMENTS, LLC (SFO)**
Jonathan Schorr, Partner, **SCHORR FAMILY PARTNERSHIP LP (SFO)**
Seonaid Mackenzie, Partner, **STURGEON VENTURES (SFO)**
Charles Murray, Partner, **STURGEON VENTURES (SFO)**
Bill McVay, Managing Partner, **RDK STRATEGIES**
John Linnartz, Owner, Founder, **LINNARTZ & ASSOCIATES, LLC**
Steen Ehlern, Managing Director, **FERGUSON PARTNERS FAMILY OFFICE (MFO)**
Brett Rubinson, Partner, **VERITABLE, LP (MFO)**
Jeannette Grabe, Director, **VERITABLE, LP (MFO)**
Giovanni de Francisci, Principal, **PETSCHEK FAMILY OFFICE (SFO)**
Jim Hover, CIO, **ELIZABETHTOWN COLLEGE**
Beata Pudelko, Assistant Treasurer, **NEW WORLD FOUNDATION**
Frohman Anderson, Managing Director, **EVERWATCH FINANCIAL INC (SFO)**
Matt Womble, Managing Director, **EVERWATCH FINANCIAL INC (SFO)**
Ellen Collis, Family Member, **EVERWATCH FINANCIAL INC (SFO)**
Joe Monaco, CFO, **EVERWATCH FINANCIAL INC (SFO)**
Astrid Womble, Family Member, **EVERWATCH FINANCIAL INC (SFO)**
Kim Anderson, Family Member, **EVERWATCH FINANCIAL INC (SFO)**
Nicole Rothschild, Chief Investment Officer, **ROTHSCHILD FAMILY OFFICE (SFO)**
Leonard DiPietra, Co-Founder, **PETRA PARTNERS, LLC**
Adam Kalish, Managing Director, **BRIDGEFISHER LLC (SFO)**
Josh Nabatian, Investment Manager, **CRAGSTON MANAGEMENT CORP (SFO)**
Bill Podd, Executive Director, **LANDMARK ANGELS INC.**
Stephen Oster, Chairman, **THE OSTER GROUP (SFO)**
James Leach, President, **LEACH FAMILY HOLDINGS (SFO)**
Dorothy Weaver, Chairman, **COLLINS CAPITAL (SFO)**

Ji-mei Ma, Managing Director, **NEBULA CAPITAL (SFO)**
Donna Zavattieri, VP/General Counsel, **SCHNEIDER FAMILY OFFICE (SFO)**
Wendy L. Craft, Esq, .VP General Counsel, **SCHNEIDER FAMILY OFFICE (SFO)**
Marc Bathgate, Vice President, **FRONT RANGE CAPITAL II, LLC (SFO)**
Christopher Fineburg, CFA, Director, **GREYCOURT & CO., INC. (MFO)**
Richard Kos, CEO & Founder, **KOS CONSULTANTS**
Gail Von Drashek, Director, **KOS CONSULTANTS**
Gary Domoracki, CEO, **FIREMAN CAPITAL ADVISORS (MFO)**
Thomas Lehrman, President, **ALTA INVESTORS (SFO)**
John Olympitis, Principal, **MVS OLYMPITIS FAMILY OFFICE (MFO)**
Darcy Bhatia, Partner, **HIGHMOUNT CAPITAL LLC (MFO)**
Allan Zachariah, Managing Director, **PATHSTONE FAMILY OFFICE (MFO)**
David Gratti, Registered Independent Advisor, **RISK PARADIGM GROUP LLC (SFO)**
Alan M. Harter, Managing Director, **PACTOLUS PRIVATE WEALTH MANAGEMENT LLC (SFO)**
Stephen Brackett, Trustee, **BRACKETT FAMILY FOUNDATION**
Tavan Pechet, President, **POINT ADVISORS (SFO**)
Kimberly Clouse, Managing Director, **CLOUSE CONSULTING**
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Jane Dietze, Partner, **NEXTPOINT FAMILY OFFICE (SFO)**
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Blakely Page, Managing Director, **HOPEDENE VENTURES (SFO)**
Jay Dickinson, Managing Director, **SYNOVUS FAMILY ASSET MANAGEMENT (MFO)**
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Jon Needle, CIO, **CHANG FAMILY PARTNERS, LTD (MFO)**
Joe Chang, Chairman, **CHANG FAMILY PARTNERS, LTD (MFO)**
Gus Ellison, Director, Advisor Solutions, **ROGERSCASEY**
Rick Pitcairn, II, Chief Investment Officer, **PITCAIRN (MFO)**
John Nawrocki, Chief Operating Officer of Multi-Manager Solutions, **ROGERSCASEY**
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Andrew Douglas, Managing Director, **TIEDEMANN WEALTH MANAGEMENT, LLC (MFO)**
Mike Kane, President, **KESTREL ASSET MANAGEMENT LLC (SFO)**
Alan Houghton, Senior Vice President, Head of New York Office, **PITCAIRN (MFO)**
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Biz Petracca, Analyst, **PEMCO MANAGEMENT LLC (SFO)**

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