

Come see why IIR's Family Office events are the most emulated in the industry!

The IIR Family Office Series Presents:

Family Office Management

"The conference was excellent. It's the only one that's mostly focused on operations and back office."

Russell Popp, Adler Management LLC

Choosing, Integrating and Implementing the Most Efficient Solutions for Your Family Office

January 24-25, 2005 • The Biltmore Hotel • Coral Gables, FL

The first place to go to learn the latest tactics for effectively managing your family office:

- Improve your back office functionality by implementing the best technology portfolio management and data aggregation reporting systems
- Avoid losing your top executives by using innovative and competitive compensation packages
- Build relationships with "best of breed" outsource service providers to reduce liability and minimize costs
- Identify and overcome your risks when evaluating your family office's employees
- Determine if you need to restructure your family office according to the goals and mission you set out to accomplish

In-Depth: Managing Your Family Office's Financial Assets to Ensure Your Family's Prosperity

A comprehensive, interactive discussion designed to give you detailed strategies for selecting the best managers for your family's assets and current investment trends for applying your new due diligence knowledge.

Plus, Numerous networking opportunities will be available for you to mix and mingle with your family office colleagues and friends, including the return of the Family Office Information Exchange!



Institute for International Research

Register Today!

CALL: (888) 670-8200
or (941) 951-7885,

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MAGNUM

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Trusts&Estates



Family Office Management

Dear Family Office Executive:

Tired of seeing the same thing at other family office conferences?

Not only is **IIR's Family Office Management** conference the **only** conference dedicated to back office, operations, technology and human resources, but it is the place to get the knowledge you need to run an efficient family office **before it appears anywhere else!**

Managing your family office is even more complex and challenging than ever before, as open architecture providers are making your decisions for best services more difficult to make, and technology advances are occurring too quickly for your family to keep up-to-date. In addition, you've told us that compensating key employees creatively and competitively has you often asking yourself, "How much is enough?"

Experts in family office technology, human resources and operations will be on hand as they provide guidance for helping you:

- Restructure your family office to assure your family's goals and missions are achieved
- Know how to manage your international real estate with effective staffing, taxation, insurance and time share strategies
- Aggregate data to produce comprehensive and complete quarterly performance reports
- Implement an optimal back office technology platform to reduce manual labor and create a family financial performance history that rivals your bank's
- Find economically viable and tax efficient solutions for your personal air travel
- Develop relationships with the best outsource providers to limit your in-house operational costs

In addition, be sure not to miss the special **In-Depth: Managing Your Family Office's Financial Assets to Ensure Your Family's Prosperity** a three-hour, comprehensive guide to allocation trends and strategies for the critical process of selecting the best people to manage your assets with your interests in mind.

Register today for Family Office Management! Call 888-670-8200, email register@iirusa.com, or visit the Web site at www.iirusa.com/familyofficemanagement.

I look forward to seeing you in Florida this January.

Sincerely,



Frank Musero
Event Director- Finance

What some of your peers said about previous IIR Family Office events:

"Tom Zanecchia was fabulous. He really spelled it out-how the families change, how they earn their own way."

—Mary Jo Herseth,
LaSalle Bank

"The conference met my expectations both from a topical to a networking basis. It had a broad range of topics reaching the most current challenges in the family office space. Good job."

—David Ward,
StoneHedge Partners

"I am new to the family office world; it was a great introduction."

—Debbie Smith,
Financial Investments Corp.

"Good to hear from the best in the industry to get a consensus perspective."

—Rob Hauswirth,
Gresham Partners

"Better in touch with what others are doing, great networking opportunities."

—James Casey,
Deloitte & Touche

Register Today!

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Monday, January 24, 2005



8:00 **Registration and Morning Coffee**

Registration Sponsored by  **CITIGROUP**
private bank

8:45 **Opening remarks by Conference Co-Chairs**

Jon Carroll, *MBA, CPA*

FAMILY OFFICE METRICS LLC

Marsha C. Witt, *Managing Director*

ASSET MANAGEMENT ADVISORS, MIAMI

9:00 **Linking Family Values with Balanced Financial Habits**

- Building a model to prevent your money from being spent in three generations
- Developing the next generation to be productive, creative heirs
- The "Adult Life Cycle" - The impact on the family office structure
- Inside-out wealth planning: Integrating the technical and family sides to wealth

Tom Zanicchia, *President*

WEALTH MANAGEMENT CONSULTANTS, INC.

9:45 **Protect Your Family's Interests With a Failsafe Audit of Your Family Office Procedures**

This comprehensive case study puts you, as a member of the board of directors of your family office, awaiting the results of your audit. Are you prepared to act upon your auditors' recommendations for improvement?

- Should you limit the number of people with access to your accounts?
- Maintaining and executing similar controls for your family office as you had for your operating business
- Identifying risks for fiduciary liability, tax preparer penalties, tax shelter regulations, security laws, labor laws, federal and state regulations, theft, incompetence...
- Analyzing the impact of nepotism in family office executive positions
- Solving liability concerns through outsourcing: A new way to look at the in-house vs. outsource debate
- Grading your family office and its people

Mark J. Blumenthal, *Partner*

BLACKMAN KALLICK BARTELSTEIN, LLP

10:30 **Morning networking break**

10:45 **Finding Providers Who Will Deliver the Top Services for Your Family**

- Determining which services you should outsource vs. keep in-house
- Identifying decision criteria to use when considering using open architecture service providers such as external CIOs or MFOs
- Identifying effective methods for locating and contracting service providers
- Building relationships between families and service providers
- Managing outsourced relationships with in-house employees to maintain employee loyalty
- Using an in-house coordinator to manage outsourced relationships

- Identifying conflicts of interest in service provider models
- Finding comparative value among various service providers' fee and compensation structures
- Managing challenges for service providers of non-financial assets

Moderator:

Thomas R. Livergood, *CFP, Chief Executive Officer*
THE FAMILY WEALTH ALLIANCE

Panelists:

Steve Braverman, *Director*
BRAVERMAN FAMILY PARTNERSHIP

Marc J. Minker, *Managing Director*
MAHONEY COHEN FAMILY OFFICE SERVICES LLC

Carol Pepper, *President*
PEPPER INTERNATIONAL

11:30 **Are You Evaluating Your Family Office Employees Fairly?**

- Understanding the latest EEOC guidelines as they relate to family offices
- Getting family members to meet the same work standards as non-family employees
- Implementing effective training programs for employees
- Tracking employee performance
- How to deliver evaluations to employees, especially to family members

Marc Silverman, *Ph.D.*

STRATEGIC INITIATIVES INC.

Rebecca Torrey, *Partner*

JEFFER MANGELS BUTLER & MARMARO LLP

12:15 **Luncheon for speakers and delegates sponsored by Private Client Resources**



1:30 **Analyzing the Mechanics of Information Flow to Develop Comprehensive Financial Reports**

- Identifying common problems associated with aggregating and normalizing high wealth data
- Why is reporting on high wealth data so complex?
- Effectively communicating information to all of the interested parties of the family office

Tania Neild, *Ph.D., CTO/COO*

PRIVATE CLIENT RESOURCES

2:00 **Implementing Portfolio Management Software Solutions to Create Back Office Efficiencies**

- Identifying the latest trends in portfolio management software solutions
- Determining the level of customization available for each product
- Pros and cons of using open architecture technology
- Integrating aggregation with custodial platforms
- Ensuring the security of your information network

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Family Office Management

Tuesday, January 25, 2005

Moderator:

Jon Carroll, *MBA, CPA*
FAMILY OFFICE METRICS LLC

Panelists:

Miriam Esteve, *COO*
THE CITIGROUP PRIVATE BANK

Additional family office technology leaders are still being lined up. If you are an innovative family office service provider and would like to participate on this panel, please contact Susan Copperman at 212-661-3500 x3131.

3:00 *Afternoon Networking Break*

3:15 **Transitioning to a New Trustee and Investment Management Platform**

- Understanding the components of the independent trust company model
- Benefits to the Family Office:
 - Coordination of customized outsourced services including estate planning, family counseling, tax planning, and investment management
 - Independence
 - Open architecture
 - Consolidated performance reporting and analysis
 - Focus on Service
- Overcoming technology platform limitations
- Identifying the benefits of keeping your trustee separate from your money manager
- Is a single family office able to offer its best services to outside clients while remaining an independent Family Office? Should it?

Robert W. Joel, *CFP, Vice President*
TIMUCUAN ASSET MANAGEMENT

Mary Knauer, *MBA, CTFA, CCTS, Executive Vice President*
LEGACY TRUST CO.

4:00 **Family Office Information Exchange**

This series of roundtable discussions - grouped according to your job function - will give you an opportunity to help your peers overcome their challenges. Various topics will be raised for discussion, specifically, issues that affect your family office on a daily basis. Operational costs, technology solutions, finding and retaining top talent, and achieving your family office's goals are just some of the issues to be considered.

Facilitator:

Kathy Wiseman, *President*
WORKING SYSTEMS

Robert Zeitlin, *(invited)*
FAMILY SOLUTIONS GROUP

5:00 *End of Conference Day One*

5:15 *Networking Cocktail Reception sponsored by Bombardier FlexJet and Calamos Investments*

**BOMBARDIER
FLEXJET**

CALAMOS INVESTMENTS
Strategies for Serious Money



8:15 *Registration and morning coffee*

8:45 *Co-Chair's Recap of Day One*

Jon Carroll, *MBA, CPA*
FAMILY OFFICE METRICS LLC

Marsha C. Witt, *Managing Director*
ASSET MANAGEMENT ADVISORS, MIAMI

9:00 **Keeping Talented Staff by Using Competitive Family Office Compensation Strategies**

- Feasibility of collecting accurate industry-wide salary data
- Implementing salary criteria for compensating Family Office Managers/CEOs, CIOs and CFOs as they relate to:
 - Family office size
 - Assets under management
 - Geography
 - Involvement with the decision making
 - Complexity of the family office
- Structuring compensation plans beyond salary for family office executives to retain top talent

Paul Gonzales, *Managing Director*
COMPENSATION SERVICES INC.

Linda Mack, *President*
MACK INTERNATIONAL

9:45 **Evaluating Your Family Office's Structure to Ensure it is Properly Serving Your Needs**

- Determining the needs of your family, and services you'd like the family office to provide
- Creating a mission statement that your family will actually use
- Revising your goals to include attainable targets
- Setting up and working within a family office structure to best accomplish your main objectives
- Identifying the procedures for making changes to your family office structure
- Timelines to consider for constructing a family office

Kathryn McCarthy
INDEPENDENT CONSULTANT

Gail Neuharth, *President & CEO*
QUERCUS LLC

10:30 *Morning networking break*

10:45 **Private Air Travel - Understanding the Options Available and Examining the Economic and Personal Impact of Each**

- Determining the financing options and economics of aviation ownership: whole vs. fractional vs. charter
- Assessing how level of ownership and asset depreciation impact taxation
- Calculating the type and level of insurance you need for each and planning for the unknown

Bob Knebel, *Vice President*
BOMBARDIER FLEXJET

James Meyer, *Partner*
HARPER MEYER

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11:15 **Implementing Effective Management Strategies for Your Overseas Real Estate**

- Determining which jurisdiction(s) to use when creating insurance packages to cover your property's employees and your family during your stay
- Techniques for ensuring your family's privacy and security
- Implementing succession plans for your overseas properties
- Efficient tax strategies for managing your international properties
- Deciding if you should hire an on-site manager to maintain your property
- Other considerations for owning international real estate

Moderator:

Marc Silverman, *Ph.D.*
STRATEGIC INITIATIVES INC.

Panelists:

Nathan Berman, *E.A.*
MULTINATIONAL TAX SERVICES INC.

Jeffrey Galant, *Partner*
GOODKIND LABATON LLP

Mary Clarke, *Partner*
HOLLAND AND KNIGHT LLP

11:55 **Employing Advances in Data Aggregation to Improve Front Office Performance Reporting**

- Collecting data and performance results
- Techniques for family offices to compile data from multiple sources and products into one consolidated report
- Creating a consolidated statement for your investments, such as hedge funds, separate accounts and private equity with new software solutions
- Obtaining summary performance that is easily understandable
- Extracting data from your database management system to produce the only the information you need
- Understanding the potential of comprehensive data warehousing to produce a robust investment history for your family

William A. Fike, *President, Personal Services*
ASSET MANAGEMENT ADVISORS

Robert Puck *Executive Vice President, COO*
WLD ENTERPRISES

12:40 *Luncheon for speakers and delegates*

In-Depth: Managing Your Family Office's Financial Assets to Ensure Your Family's Prosperity

One of the most important roles of family office management is to evaluate, select, and monitor the people, the firms, and the deals that interact with your office, including investment advisors, money managers and anyone else who offers to provide advice, services, or transactions. This session will walk you through an in-depth framework for building an optimal investment team, with case examples, individual techniques, and practical checklists, as well as provide a forum for you to apply the framework and work through your real-life challenges with the panel members in a small group setting.

Moderator:

Brad Fisher, *General Partner*
PEMIGEWASSET PARTNERS LP

1:40 **Case Studies: Stories About How Families Reacted to Hiring Fraudulent Managers, and How Being Proactive Can Produce Instant Results**

Hiring a manager who isn't who he says he is can have profound effects on a family, including huge losses. While there is no magic bullet for locating and hiring the best managers to work with your family, learn how one family overcame that horror. In addition, hear how another family used a detailed checklist and, after enough homework, saw all the pieces fall into place with almost immediate results.

- Overview of the innovative ways to look at due diligence
- Introducing a new, proactive protection framework into your family's decision making
- Avoid catastrophe by learning how to ask the right questions- Are you digging deep enough?
- Examples of what can go wrong and how they can be fixed
- Reaping the benefits of choosing the right people

2:20 *Afternoon networking break*

2:35 **Ensuring Deals and Asset Managers Produce the Results You Need By Employing Optimal Selection and Evaluation Procedures**

- Developing criteria for selecting the best investment managers, including: performance history, ability to repeat their performance, and capability of handling your growing assets
- Performing research and background checks on your potential managers
- Separating the personal from the professional among your providers
- How to determine if deal terms fit your needs before you invest and strategies for getting out of bad deals

3:30 **Applying Optimal Strategies for Readjusting Your Investment Portfolio, Including Manager Transition**

- Rebalancing your portfolio to incorporate new investment trends into your allocation strategy
- Ensure your managers adhere to your mission with proper monitoring tactics
- Determining when you should place your managers on notice in the event of strategy drift
- Creating a smooth and seamless transition when bringing in new managers

Small group working sessions with individual panel members

Following the presentation, you will breakout into smaller discussions with each of the panelists to discuss the areas that concern you most in a more intimate setting.

Panelists:

Jim Baka, *Vice President and Director of Private Client Group*
CALAMOS INVESTMENTS

Whitney Quillen, *General Partner*
Q PROPERTIES LP

Chuck Ranson, *CEO and Founder*
INTEGRITAS ADVISORS

4:30 *Conference Concludes*

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Family Office Management

Eight reasons not to miss Family Office Management:

1. Protect yourself from litigation by reducing your family's immediate liability and increasing accountability.
2. Determine cost-efficient solutions for providing pivotal services to your family members.
3. Develop comprehensive front and back office technology solutions to manage your portfolio performance.
4. Create wealth strategies to springboard the next generation into new ventures or businesses.
5. Know your risks when implementing employee performance measurement programs.
6. Evaluate and select the best investment managers to preserve and grow your assets.
7. Meet and interact with other family office members through a variety of networking opportunities.
8. Get information for running a streamlined family office before you can get it anywhere else.

Who should attend and whom will I meet?

- Single Family Office Members
- Single Family Office Executives, including: Chief Executives, Chief Information Officers, Chief Operations Officers, Chief Technology Officers, Human Resource Directors
- Family business owners and executives
- High net worth individuals
- Multi-family office executives
- Technology solutions providers
- Consultants: Wealth Management, Human Resources, Technology
- Portfolio and Investment Managers
- Insurance Executives
- Tax and Accounting Specialists

About the Hotel:



Built in 1926, the Biltmore Hotel is an award winning, National Historic Landmark property offering luxury hotel accommodations and 76,000 square feet of meeting facilities. The property features an 18-hole golf course, 10 lighted tennis courts, The Biltmore Fitness Center and Spa, an array of fine restaurants and lounges, private wine cellar club and the largest hotel swimming pool in the continental United States. Located in the heart of Coral Gables, The Biltmore is designed in the Mediterranean revival style with large stone columns, decorative hand-painted ceilings, Italian marble floors and an open-air courtyard and fountains. The Seaway Group, a leading hospitality organization that owns and manages quality hotels and properties, owns The Biltmore.

Also at the Biltmore:



January 26, 2005: Mastering Estate & Tax Planning

Stay in Florida an extra day and attend this one-day conference focused on advanced tax and estate planning and wealth transfer strategies for the family office. Addressing all the latest developments, including trust formation, charitable giving strategies, offshore asset protection, international tax changes and much more, this is a must-attend event for family offices, trust and estate attorneys, consultants, accountants and anyone else involved in family office estate planning. With the most respected practitioners and members of family offices and foundations speaking, the conference will offer a unique balance of topics and case studies and provide the premier learning opportunity and networking event of the year. Register today for both events and receive a special combination rate!



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The Institute for International Research has been certified by the New York State Continuing Legal Education Board as an Accredited Provider of continuing legal education in the State of New York through June 30, 2003. Application for renewal of Accredited Provider status is currently pending. CLE credits are available for most other states and may vary depending on your state's rules and regulations. For more information on IIR's financial hardship policy, call Kimberly Johnson at (212) 661-3500 x 3052.

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Bombardier Flexjet® offers affordable access to business jet travel through the purchase of shares in Learjets® and Challengers®. Flexjet guarantees

24-hour fleet access with as little as four hours' notice. Owners pay predictable fees and their aircraft are maintained and managed by Bombardier on their behalf. Flexjet is a division of Bombardier Aerospace Inc., the third largest civil aircraft manufacturer in the world, the world's largest business jet manufacturer, and the leader in regional commercial aircraft.



Calamos Investments is a global asset manager, founded in 1977 and headquartered in Naperville, Illinois. John P. Calamos, Sr. and Nick P. Calamos oversee the investment team which

manages assets for individuals and institutions through a full range of equity, balanced, fixed-income, alternative, and convertible investment strategies. Working closely with the investment team, CALAMOS Private Client Group provides customized wealth management advice and support to high-net-worth investors, family office advisors, business owners, and endowment and foundation executives.



Private Client Resources, LLC (PCR) is a web-based, information company serving the high wealth community. PCR collects, standardizes, displays and analyzes information concerning the various personal holdings of wealthy families and individuals irrespective of where accounts are managed. PCR

provides customized private label, secure websites that enable families and advisors to view consolidated information and a holistic view of the financial picture.

PCR is an information company. PCR does not give financial advice, sell financial products or provide broker services.



As part of the largest, most dynamic financial institution in the world, **The Citigroup Private Bank** offers a full

range of wealth management services, including Custody, Portfolio Management, Family Advisory, Art Advisory, Risk Management, Wealth Transfer Planning and a division devoted solely to the financial needs of the legal community.

To learn more about The Citigroup Private Bank's Custody and Trust Services, please contact our representatives:

Gerald P. Scales, Director, Preferred Custody Services, The Citigroup Private Bank, 212.804.4450

Bill Barbeosch, Managing Director, Trust and Estate Planning, The Citigroup Private Bank, 212.559.1909

The 12th Annual Family Office Forum

June 6-8, 2005,

The Sheraton Chicago Hotel & Towers

Register today for the most talked about family office industry event! With over 350 attendees in 2004, the Family Office Forum brought together families from all over the world for three days of networking and expert information about the challenges you deal with regularly, including alternative investment management strategies, teaching the next generation about wealth, trust and estate planning, and philanthropy and foundation trends. Find out what your peers have been up to and register for the 12th Annual Family Office Forum today! Call 888-670-8200 now!

ADMINISTRATIVE DETAILS

5 Easy Ways to Register

REGISTRATIONS: Please complete and return the registration form to Customer Service Manager:

FAX: (941) 365-2507
CALL: (888) 670-8200 or (941) 951-7885
MAIL: IIR NY, P.O. Box 3685, Boston, MA 02241-3685
EMAIL: register@iirusa.com
WEB: http://www.iirusa.com/familyofficemanagement

Group Discounts Available. Please contact Aloycia Bellillie at (212) 661-3500 ext. 3702 for details.

FEE: The standard fee for attending IIR's Family Office Management is outlined on the registration form. This includes the luncheon and refreshments, and the conference documentation and materials submitted by the speakers. You may enclose payment with your registration or we will send an invoice. Payments can be made by check, VISA, MasterCard, Diners Club or American Express. Please make checks payable to the "Institute for International Research, Inc." and write the name of the conference delegate(s) on the face of the check as well as our reference U2034. Payments must be paid by September 13, 2004, to ensure seating at the conference and inclusion on the delegate list.

DATES AND VENUE: January 24-25, 2005

The Biltmore Hotel
1200 Anastasia Avenue
Coral Gables, Florida 33134

TELEPHONE: (305) 445-1926*

*This # is for general hotel information only. Hotel will not accept individual call-ins for hotel room reservations at IIR's negotiated group rate.

ACCOMMODATIONS: A block of rooms will be held for a limited period of time at The Biltmore Hotel. All hotel bookings must be made through The Global Executive's Internet booking site. Please visit www.globalexec.com/iir to make your reservation. If you do not have web access, or need additional assistance, please call The Global Executive at (800) 516-4265 or (203) 431-8950. You can also send them an email at conf@globalexec.com or fax them at (203) 431-9305. The hotel will not accept individual calls for room reservations at the IIR negotiated group rate.

SUBSTITUTIONS AND CANCELLATIONS: Should you be unable to attend for any reason, please inform us IN WRITING prior to September 13, 2004, and a credit voucher for the full amount will be issued. If you prefer, a full refund less a \$395 non-refundable deposit will be issued. No refunds or credits will be given for cancellations received on or after September 13, 2004. Substitutions of enrolled delegates may be made at any time. Please indicate upon registration whether you are eligible for a discount. No two discounts can be combined. If, for any reason, IIR decides to cancel this conference, IIR does not accept responsibility for covering airfare, hotel or other costs incurred by registrants, including delegates, speakers, sponsors and guests. Program content subject to change without notice.

PRESS NOTICE: Press permission must be obtained prior to the event and is dependant upon speakers' approval. The press may not quote speakers or delegates unless they have obtained their approval in writing. Press passes do not include admittance to break-out sessions.

DOCUMENTATION ORDER: If you are unable to attend the program, or would simply like to order additional sets of documentation for your colleagues, they are available for \$395 per set, including taxes, postage and shipping in the U.S. Please fill out the order form on the back of the brochure. The documentation is available for shipment two weeks after the conference takes place.

CREDIT CARD PAYMENT ONLY.



Any disabled individual desiring an auxiliary aid for this conference should notify IIR at least 3 weeks prior to the conference in writing by faxing (212) 661-6045.

SPONSORED EVENTS AND TABLE TOP EXHIBITS: Are you looking for a creative way to reach top-level decision-makers? Why not consider sponsoring a luncheon, cocktail party or refreshment break? Maybe you're looking for the perfect forum to showcase your products and services or an onsite communication center. For information on sponsorship or exhibition opportunities please contact Susan Copperman at 212.661.3500 ext. 3131.

COMPLAINT RESOLUTION POLICY: For more information regarding administrative policies such as complaint and refund, please contact our offices at (888) 670-8200 or (941) 951-7885.

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Family Office Management Registration Form

Five Easy Ways to Register

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Yes! Please register the following individual(s) for Family Office Management

Please check the appropriate box:

Early Registrations - Register by October 15, 2004

Yes! I want to register for the conference - \$2195/1195*

Regular Registrations- Register by December 10, 2004

Yes! I want to register for the conference - \$2295/1295*

Late Registrations - Register after December 10, 2004

Yes! I want to register for the conference - \$2395/1395*

Yes, I want to add Mastering Estate & Tax Planning (U2035) for \$995

* Rate for single family offices, endowments and foundations only. (Subject to IIR approval). Not applicable to multifamily offices, investment advisors, investment managers, financial service companies or other service providers.

(1) Name _____

Title _____ Department _____

(2) Name _____

Title _____ Department _____

Your Manager _____ Title _____

Company _____

Address _____

City _____ State _____ Zip _____

Tel: () _____ Fax: () _____

Yes! Please keep me informed about future IIR events via fax

E-Mail: _____

Yes! Keep me informed about future events via e-mail

METHOD OF PAYMENT

I have enclosed my payment I will register now and pay later**

Please charge my credit card:

Visa MasterCard American Express Diner's Club

Credit Card No. _____ Exp. Date _____

Signature _____

**Payment must be received by January 10, 2005

EXHIBITIONS/SPONSORSHIPS:

Please send me more information on how to: Exhibit Sponsor

INCORRECT MAILING INFORMATION

If you are receiving multiple mailings, have updated information or would like to be removed from our database, please contact Natalie Small at (212) 661-3500 ext. 3193 or fax this page to her attention at (419) 781-6036. Please keep in mind that amendments can take up to 6 weeks.

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events are the most
emulated in
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The IIR Family Office Series Presents:

Family Office
Management

Choosing, Integrating and Implementing the Most
Efficient Solutions for Your Family Office

January 24-25, 2005 • The Biltmore Hotel • Coral Gables, FL



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