January 30 - 31, 2007 | Trump International Sonesta Beach Resort, Sunny Isles, FL

Mastering Tax & Estate Planning Summit

Optional addition to Family Office Management Conference • Monday, January 29, 2007

Mastering Tax & Estate Planning Summit

Ensuring Successful Wealth Transfer

Note that all sessions will include a Q&A at their conclusion, in addition to a general Q&A period at the end of the day

8:00	*Morning Registration and Coffee*
8:30	**Introduction: What's on the Legal Minds of Family Offices for 2007** Summit Chair: Tom Handler, Principal, **HANDLER, THAYER & DUGGAN**
8:40	**Exposing The Psychological Dilemma of Zero Tax Strategies**
9:35	**Asset Protection Strategies: Creating a Blueprint for Wealth Protection** Tom Handler, Principal, **HANDLER THAYER DUGGAN**
10:35	Networking and Refreshment Break
10:55	**Integrating Tax, Estate and Investment Strategies Across the Family** Doug Rogers, **CTC CONSULTING** Rhona Vogel, **VOGEL CONSULTING**

12:00	*Luncheon for Summit Attendees and Speakers*
1:30	**The Foundation of High-end Advanced Wealth Planning: Structure and Valuation of Family Limited Partnerships/ Family Limited Liability Entities** Milford B. Hatcher, Jr., **JONES DAY**
2:25	**Philanthropic Solutions for Passing on Wealth** Eileen R. Heisman, President & CEO **NATIONAL PHILANTHROPIC TRUST**
3:20	*Networking and Refreshment Break*
3:40	**Tax & Wealth Transfer Strategies for Operating Businesses and their Families** Michael S. Jackson, Senior Manager, Tax Services, **SMART ACCOUNTING AND CONSULTING** Randi Jowers, Tax Manager, **SMART ACCOUNTING AND CONSULTING**
4:35	**International Trust & Tax Planning: Opportunities for US Families Across the Globe** Robert Colvin, **ROBERT D. COLVIN & ASSOCIATES**
5:30	**Tax & Estate Question and Answer Session** *All speakers will be on-hand to address delegates' specific issues*
5:50	*Conclusion of Day*

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Agenda Day One

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Day One, Tuesday, January 30, 2007

7:30	*Morning Registration and Coffee*
8:30	**Conference Chairperson's Opening Remarks** Kathy Wiseman, President, **WORKING SYSTEMS**
8:40	**Benchmarking Your Family Office Business: Quantifying Your Shortcomings and Maximizing your Strengths** Robert W. Joel, Vice President, **TIMUCUAN ASSET MANAGEMENT, INC.**

	Tom Livergood, President, **THE FAMILY WEALTH ALLIANCE** Robert Casey, Sr. Managing Director of Research, **THE FAMILY WEALTH ALLIANCE**
9:40	**One Size Does Not Fit All: Surveying the Technology Landscape to Create the Platform You Need** Tania Neild, CTO, **INFOGRATE INC** Rhona Vogel, President, **VOGEL CONSULTING** Annette Franqui, Partner, **FORRESTAL CAPITAL**
10:40	*Networking and Refreshment Break*
11:05	**Technology Checklist: Logical Guidelines for Conducting a Needs Analysis Before Spending Another Dime** Ed Van Deman, CEO, **FINANCIAL NAVIGATOR** Dale Veitch, Managing Member, **LEXINGTON FAMILY OFFICE** Robert Trinchet, Sr. VP for Information Technology, **ASSET MANAGEMENT ADVISORS**
11:40	**"In the beginning there was the Family Business... The Birth of The Family Office: A Case Study** Mark J. Blumenthal, Partner, **BLACKMAN KALLICK**
12:30	*Lunch for Conference Attendees*

1:35	**Family Office Human Capital Lay of the Land: Solving Today's Staffing Issues** Chuck Meek, President, **EXECUTIVE LEADERSHIP RESOURCES, INC**	
2:35	**Filling in the Staffing Holes : Outsourcing Strategies for Job Functions** Linda C. Mack, President, **MACK INTERNATIONAL, LLC** Carol Pepper, President, **PEPPER INTERNATIONAL**	
3:25	*Networking and Refreshment Break*	
3:45	**Establishing a Legacy: Family Education Program Design** Teddie L. Ussery, Founder, **FAMILY OFFICE MATTERS**	

	Iris Wagner, Ethical Will Producer, **MEMOIRS PRODUCTIONS**
4:25	**Once the Legacy Goals are Identified... Implementing a Family Education Program** Greg Rogers, Founder & President, **RAYLIGN ADVISORY LLC**
5:10	**NEW Family Office Management Showcase** **Keeping the Family Running Seamlessly with Vital Services like Private Aviation and other Solutions: A Mock Case Study to Apply to Every Family Office** **Meet the Walsh Family**. The Walsh's have $150M in assets, most generated upon the sale of their national chain of home improvement stores in 2002 and established their family office the following year. John Walsh and his wife Susan are based out of Atlanta and also maintain homes in Telluride, the Cote d'Azur, and the Caribbean. Their three grown children and grandchildren are spread around the world and the nuclear families travel frequently to the family homes. This year the family wants to plan a retreat in the Caribbean, though Susan has many privacy concerns given their high profile and the number of children that would be traveling. In addition, there are concerns about bringing John's elderly father, who has been experiencing growing health issues. Hear how leading solution providers help the Walsh Family and their family office with their increasingly complex financial and personal life... and how they could relieve some of your own family office management headaches. Featuring Steve Gentry **BOMBARDIER FLEXJET**
6:00	*End of Day*
	Cocktail reception Co-sponsored by BOMBARDIER FLEXJET

Agenda Day Two

Day Two, Wednesday, January 31, 2007

8:00	*Morning Coffee*
8:30	**Conference Chairperson's Day Two Remarks** Kathy Wiseman, **WORKING SYSTEMS**

8:40	**Determining the Value of Asset Allocation and How to Manage an Increasingly Complex Portfolio** Steve Braverman, Managing Director, **BRAVERMAN FAMILY PARTNERSHIP** Robert Bernstein, President, **PRISM FAMILY OFFICE**
9:40	**Money Manager Due Diligence for Family Offices for the Diversified Portfolio** Brenda Sallstrom, **CHERRY TREE FAMILY OFFICE** Dina L. McClung, Vice President, Hedge Funds & Private Equity Investing, **TAUBMAN ASSET MANAGEMENT**
10:40	*Networking and Refreshment Break*
11:00	**Information Exchange**
12:00	*Lunch for Conference Attendees*
1:15	**Best Practices Spotlight: Back Office Reporting: Structure, Systems, and Solutions** Maureen L. Stewart, Vice President Taxation, **ATAPCO FINANCIAL SERVICES, INC.** **Account Aggregation Strategies** Paul Hoffman, Chief Operating Officer, **TBK INVESTMENTS, INC.**
2:10	**Leave Room for No Surprises: A 360 Degree Look at a Family Office Risk Management Profile** Michael Brink, Executive Vice President, **NEASE, LAGANA EDEN & CULLEY** Tom Handler, Principal, **HANDLER, THAYER & DUGGAN**
2:55	Afternoon Break
3:10	**Mechanics and Due Diligence in Private Equity Investing** Steven Hartman, Principal, **LEVINE LEICHTMAN CAPITAL PARTNERS, INC.**
3:55	*End of Conference*