

June 12-14, 2006
Marriott Downtown Magnificent Mile
Chicago, IL

The largest, longest established
and leading independent family
office event in North America

THE 13TH ANNUAL

Family Office

F O R U M

THE DEFINITIVE EVENT FOR MANAGING FAMILY WEALTH



About the Family Office Forum:

- ✓ Longer, More Tactical Sessions than any Other Family Office Event
- ✓ Focus on Global Issues and International Investments
- ✓ Designed for Family Offices by Family Offices
- ✓ Over 60 speakers and 30 different sessions
- ✓ Session topics examining the pressing issues facing family offices today
- ✓ Updated strategies for asset allocation: Meeting the need for the 21st century family portfolio

Our distinguished Speaker Faculty includes:

John Bailey, SPRUCE PRIVATE INVESTORS
Doug Bauer, ROCKEFELLER PHILANTHROPY ADVISORS
Robert Bernstein, PRISM GLOBAL ADVISORS
Mark Blumentha, BLACKMAN KALLICK
Steven Braverman, BRAVERMAN FAMILY PARTNERSHIP
Fredda Herz Brown, THE METROPOLITAN GROUP
Jon Carroll, FAMILY OFFICE METRICS
Amit Choudhury, PINNACLE PARTNERS
Robert Colvin, BAKER & MCKENZIE
Daniel Furey, HARBERT MANAGEMENT CORP.
Donna Gilding, LOWENHAUPT AND CHASNOFF
Dennis Jaffe, FAMILY WEALTH ADVISOR
Tom Handler, HANDLER, THAYER & DUGGAN
Michael Guidry, THE GUIDRY GROUP
Steven Hartman, LEVINE LEICHTMAN CAPITAL PARTNERS
Denis Kleinfeld, FOUR POINTS FAMILY OFFICE
Barbara Hauser, CADWALADER, WICKERSHAM & TAFT
Lee Hausner, IFF ADVISORS
Patricia LeBon, ACORDIA PRIVATE CLIENT RESOURCES
Tom Livergood, FAMILY WEALTH ALLIANCE
Stuart E. Lucas, CATAUMET PARTNERS
Linda Mack, MACK INTERNATIONAL
Kathryn McCarthy, PRIVATE CONSULTANT
Dina McClung, TAUBMAN ASSET MANAGEMENT
Juan Meyer, ASSET MANAGEMENT ADVISORS
John Noddings, NLP INVESTMENTS
Barbara Novick, BLACKROCK
Carol Pepper, PEPPER INTERNATIONAL
Mark Polzin, MORELAND MANAGEMENT
Vic Preisser, THE WILLIAMS GROUP
Diana Proper de Callejon, EXPANSION CAPITAL
Mark Rubin, THE METROPOLITAN GROUP
Brenda Sallstrom, CROSSWATER
Lynette Schroeder, DREIHAUS CAPITAL MANAGEMENT
Marc Silverman, STRATEGIC INITIATIVES
Patricia Soldano, CYMRIC FAMILY OFFICE SERVICES
Christopher Snyder, PRIVATE CLIENT RESOURCES
Jon Sundt, ALTEGRIS INVESTMENTS
Dale E. Veitch, LEXINGTON FAMILY OFFICE
Teddy Ussery, SYNOVUS FAMILY ASSET MANAGEMENT
Rhona Vogel, VOGEL CONSULTING GROUP
Wendy Warren, BAHAMAS FINANCIAL SERVICES BOARD
Roy Williams, THE WILLIAMS GROUP
Kathy Wiseman, WORKING SYSTEMS



Lee Hausner
IFF Advisors



Patricia Soldano
Cymric Family Office Services



Tom Handler
Handler, Thayer & Duggan



Kathryn McCarthy
Private Consultant



Barbara Novick
BlackRock



Fredda Herz Brown
The Metropolitan Group



Tom Livergood
Family Wealth Alliance



Carol Pepper
Pepper International



Robert Bernstein
PRISM Global Advisors



Mark Blumenthal
Blackman Kallick

New Track Structure: Designed to give you fine-tuned information
pertinent to your individual needs and interests

Day One Tracks	Fundamentals	Investments	“Beyond the Basics”
Day Two Tracks	Financial Family Office	Operating Family Office	General Wealth Management

Sponsors:



SPECIAL KEYNOTE PRESENTATION



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Family Office
FORUM

THE DEFINITIVE EVENT FOR MANAGING FAMILY WEALTH

Dear Family Office Executive,

We are excited to present you with the program for the **13th Annual Family Office Forum**, the definitive event for managing family wealth, June 12-14, 2006 in Chicago. You're invited to attend this event, the largest, longest established and leading independent family office event in North America!

Join more than 350 family office executives and advisors as a **speaking faculty of over 60 industry leaders** takes you through the most pressing issues across all aspects of high net worth wealth management: investments, tax issues, family dynamics, administration, philanthropy and risk management.

What to Expect from the Family Office Forum 2006:

- **Longer, More Tactical Sessions than any Other Event** – Drill down beyond the basics... with limited panel sizes and extended timeslots, you will hear the experts expound upon the pressing topics of the day instead of hearing brief sound bytes that just glaze over issues
- **Specialized Tracks**- Tailor your conference experience based on your unique needs and interests
- **Focus on Global Issues and International Investments**- Reflecting the increasingly global nature of family offices and their portfolios, most sessions will include speakers representing the international viewpoint
- **Balanced Audience**- The delegate make-up is monitored to ensure an equal balance of family office executives and the expert advisors they need to access are present at the event
- **Designed for Family Offices by Family Offices**- Program content based on extensive research and feedback from family office executives to ensure the topics and speakers presented hit on your most pressing issues... not just what companies want you to hear

New Track Structure: Designed to give you fine-tuned information pertinent to your individual needs and interests.

Attendees may alternate between tracks:

Day One Tracks	Fundamentals	Investments	“Beyond the Basics”
Day Two Tracks	Financial Family Office	Operating Family Office	General Wealth Management

Featuring more than 30 sessions, including:

- **Family Office Structures and Lifecycles:** A Holistic View of the Industry Past, Present and Future
- **Global Asset Allocation Trends** for the Investing Family
- **Education of the Third Generation:** Overcoming Common Pitfalls that Prevent the Perpetuation of Wealth
- Tax Strategies that can **Super Charge Investment Returns**
- **Integrated Risk Management:** Human capital, Insurance and Legal Risk Solutions
- Trends in Money Management: **Who is Best to Manage the Wealth**
- **Emerging Investment Analysis and Decision Making Solutions** that Make Single and Multi Family Offices Customized and Scalable

Featured presentations include:


Estate Planning for the Post-transition Period...
The Emerging Need (and Opportunity) for Affluent Families and their Professional Advisors
This session will reveal research findings about why 2/3 of families lost their assets and unity after estate transitions.
Session attendees will receive a pre-press complimentary copy of the new book on Post-Transition Planning!

Steven D. Levitt: Best Selling Author
Freakonomics: A Rogue Economist Explores the Hidden Side of Everything
Steven Levitt is not your typical economist. He is a much heralded scholar who studies the stuff and riddles of everyday life and whose conclusions regularly turn the conventional wisdom on its head. *Freakonomics* establishes this unconventional premise:
If morality represents how we would like the world to work, then economics represents how it actually does work.
Levitt’s address at Family Office Forum will literally redefine the way we view the modern world.

This is gearing up to be the best Family Office Forum to date, and we hope you can join us for this opportunity to mingle with peers and leaders in their respective fields. Visit the event website at www.familyofficeforum.net for up-to-the-minute updates regarding the program and special networking events.

I look forward to seeing you in Chicago!

Sincerely,



Hollie Goldman
Event Director

p.s. Sign up for our Pre-Conference Workshops, designed to give in-depth analysis in interactive settings on myriad complex issues.



AGENDA AT A GLANCE

JUNE 12: Instructional Workshop Day

7:45 <i>Registration. Morning Coffee</i>			
8:30 – 12:00 Workshop A: What's New in the Worlds of Asset Protection, FLPs/ FLLCs, GRATS and Cross-Border Estate Planning Opportunities Robert Colvin, Baker & McKenzie, David Handler, Kirkland & Ellis		8:30 – 12:00 Workshop B: New Ways to Address Traditional Human Resource Challenges: Attracting, Maintaining and Developing Key Talent Linda Mack, Mack International , Dennis Jaffe,Advisor to Families on Family Business, Succession, Wealth and Philanthropy	
1:00 – 4:30 Workshop C: Sustainability: Using Tactical Methods and Proven Methodologies for the Human Capital Component of Family Wealth Transfer Fredda Herz Brown, Ph.D., The Metropolitan Group, Mark B. Rubin, The Metropolitan Group		1:00 – 4:30 WORKSHOP D Taking the Family Office to the Next Level: Blueprints for expanding your family office Carol Pepper, Pepper International, Thomas J. Handler, Handler, Thayer & Duggan	
 5:00 – 6:00 Family / Family Office Closed Door Information Exchange	 5:00 – 6:00 Business Card Exchange for Advisors and Service Providers	 6:00 Welcome Reception	

JUNE 13: Main Conference Day One

	7:30 – 8:30 <i>Family Office Closed Door Breakfast</i> 	9:45	Global Asset Allocation Trends for the Investing Family Barbara Hauser, Cadwalader, Wickersham & Taft LLP Lynette Schroeder, Driehaus Capital Management, Inc. John C. Bailey, Spruce Private Investors, LLC	
7:30	<i>Registration & Morning Coffee</i>	10:45	<i>Mid-Morning Break</i>	
8:30	Opening Remarks Robert Bernstein, PRISM Global Advisors, LLC	11:10	Education of the Third Generation: Overcoming Common Pitfalls that Prevent the Perpetuation of Wealth Discussion participants: Kathryn McCarthy, Independent Consultant Kathy Wiseman, Working Systems Lee Hausner, IFF Advisors	
8:45	Family Office Structures and Lifecycles: A Holistic View of the Industry Past, Present and Future Tom Livergood, The Family Wealth Allianc Thomas J. Handler, Handler, Thayer & Duggan Juan Meyer, Asset Management Advisor Stuart E. Lucas, Cataumet Partners Teddie Ussery, Synovus Family Asset Management		12:15	Understanding the Psychology of Taxes on Investor Behavior Mark J. Blumenthal, Blackman Kallick
			12:50	<i>Lunch</i> KEYNOTE: Steven D. Levitt, Author of Freakonomics.
	Track A: Fundamentals	Track B: Investments		Track C: Beyond the Basics
2:15 – 3:10	Steps for Building Long-Term, Profitable Philanthropy Programs Douglas Bauer, Rockefeller Philanthropy Advisors	Hedge Funds: Finding Talent and Opportunity in Today's Crowded Environment Jon Sundt , Altegris Investments		Moving Portable Alpha onto the Family Office Radar Barbara G. Novick, BlackRock
3:10	<i>Afternoon break</i>			
3:35- 4:30	How to Benchmark Your Family Office Jon Carroll, Family Office Metrics	Private Equity Opportunities Best Suited for Family Offices Daniel Furey, Harbert Management Corporation Steven Hartman, Levine Leichtman Capital Partners		A Look Abroad: Managing the Global Family Office Carol Pepper, Pepper International
4:35 – 5:30	Global Security for the Family: Protecting Family Members and Their Assets Around the Globe Denis Kleinfeld, Four Points Family Office Michael Guidry, The Guidry Group	Emerging Markets' Current and Anticipated Positioning in the Family Office Portfolio Kevin Terhaar, Stairway Partners, LLC		Understanding the Buzz Behind Premium Finance and When it's Right for the Family Office Jim Laughlin, Millennium Brokerage Group William L. Zelenik, Millennium Brokerage Group
5:30	<i>End of Day One</i>			

JUNE 14: Main Conference Day Two

8:00	Registration & Morning Coffee		10:45	Emerging Investment Analysis and Decision Making Solutions that Make Single and Multi Family Offices Customized and Scalable Jon Carroll, Family Office Metrics Amit Choudhury, Pinnacle Partners Rhona Vogel, Vogel Consulting Group Christopher Snyder, Private Client Resources	
8:30	Opening of Day Two Fredda Herz Brown, The Metropolitan Group				
8:40	Integrated Risk Management: Human capital, Insurance and Legal Risk Solutions Patricia LeBon, Acordia Private Client Risk Management Michael J. Brink, Nease, Lagana, Eden & Culley, Inc.				
9:25	Trends in Wealth Management: Who is Best Positioned to Serve the Family? Donna Gilding, Lowenhaupt and Chasnoff Patricia Soldano, Cymric Family Office Service Mark F. Polzin, Moreland Management Alanson B. Houghton, Shelterwood Financial Services Brenda B. Sallstrom, Crosswater Wendy Warren, Bahamas Financial Services Board				
10:25	Mid-morning Break		11:45	Structured Products in Alternative Asset Classes: The Next Wave in Investing Robert Bernstein, PRISM Global Advisors Steven Braverman, Braverman Family Partnership/Tahoe Advisers	
				12:35	Lunch
	Track A: Financial Family Office		Track B: Operational Family Office		Track C: General Family Wealth
1:40-2:35	Alternative Investing Due Diligence John Noddings, NLP Investments, Inc. Jeff Blumberg, Gardner Carton & Douglas LLP Matthew Osborne, Altegris Investments		Tax Planning for the Family Operating Business Michael Hearne, Rothstein Kass		Financing Options for “Boys Toys”: Guide to Keeping Management of Private Jets and Other Luxuries Under Control Bombardier Flexjet
2:40-3:25	Multi-Family Office Pricing Structures: Why it’s More Difficult than you think to Make Profits Christopher Snyder, Private Client Resources Dale E. Veitch, Lexington Family Office		Navigating the Shift from Family Business to Family Office: the Liquidity Event and Beyond Marc A. Silverman, Strategic Initiatives		Socially Responsible Investing: What it is, What is isn’t, and How to Make its Returns Exceed Expectations Diana Proper de Callejon, Expansion Capital
3:25	Estate Planning for the Post-transition Period... The emerging need (and opportunity) for Affluent Families and their Professional Advisors Roy Williams, The Williams Group, Vic Preisser, The Williams Group				
4:10	End of conference				

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8:30 –12:00* WORKSHOP A

What’s New in the Worlds of Asset Protection, FLPs/ FLLCs, and GRATS and How to Take Advantage of New and Pending Legislative Changes

This workshop is designed to offer a high-level, in-depth updates and strategies; although a brief overview will be given in each section, those with a background in tax and estate planning will most benefit from this intensive session.

Part One: Asset Protection Strategies

- Coordinating disparate legal counsel, including corporate, securities, real estate, and divorce to create a blueprint for wealth protection
- Identifying the most dangerous liabilities within your family office
- Developing a game plan to prepare for litigation should it come your way
- Creating a way out: Building structures that give family members alternatives to lawsuits

Part Two: FLPs (Family Limited Partnerships) and FLLCs (Family Limited Liability Companies)

- How to use these tools to transfer wealth to selected heirs without impairing liquidity
- Protecting the FLP/ FLLC despite increased IRS scrutiny
- Updates to FLP law
- Conducting risk/ threat analysis
- Critical updates to required documentation

Part Three: GRATS (Grantor Retained Annuity Trusts)

- Structuring GRATs to maximize results
- Using multiple GRATs for different assets to increase benefits
- Locking in GRAT benefits

Part Four: Cross-Border Estate Planning Opportunities

- Special planning for the non-citizen spouse
- Cross border estate planning for US resident family members, Non-US family’s ownership of US investments, and US investments overseas
- Traditional domestic estate planning strategies, including installment sales, private annuities, and grantor trusts

Workshop Leaders

David A. Handler, Partner, KIRKLAND & ELLIS

David A. Handler is a partner in the Trusts and Estates Practice Group of Kirkland & Ellis LLP. Mr. Handler is a graduate of Northwestern University School of Law and the University Of Illinois College Of Commerce. Mr. Handler is a fellow of the American College of Trust and Estate Counsel, a member of the Chicago Estate Planning Council, and the professional advisory committee of the several non-profit organizations, including the Chicago Community Trust, The Goodman Theatre and WTTW11/98.7WFMT. He is the author of numerous articles in estate planning and taxation journals, and writes the monthly “tax update” column for Trusts & Estates Magazine.

Robert D Colvin, Partner, BAKER & MCKENZIE LLP

Mr. Colvin advises high net worth international private clients and the institutions that service them on international business, tax, asset protection, estate planning and wealth accumulation strategies through foreign and domestic trusts, life insurance products, private companies, partnership entities and other creative planning vehicles. Mr. Colvin founded and throughout its five year history chaired the International Bar Association’s annual Global Family Office Summit, which has in 2006 merged with IIR’s Family Office Forum.

8:30 –12:00* WORKSHOP B

New Ways to Address Traditional Human Resource Challenges: Attracting, Maintaining and Developing Key Talent

Recently identified as the leading challenge affecting the family office industry once again, hiring and retaining the right professionals continues to challenge even the most seasoned of family offices. Participate in hands-on exercises representing real-life case studies our experts have navigated.

Inside the Family Office

- Challenges in putting hiring, succession and incentive plans into practice in the family office environment
- Commonalities and differences between hiring for a family office and a traditional business
- How your strategy must change as the family office grows and matures: plans for various milestones such as “just getting started” to “3-5 years” to “5 years +” and hiring scales to amount of assets under management
- Step by step advice on creating governance structures and strategic plans that resonate throughout all stages of hiring
- Update on the compensation structures and performance metrics for family office executives
- Assessing human capital needs as clients and families become more global
- Management Team and Family Board
 - Challenges in developing a successful team and working relationship
 - Teamwork between the Family Office executives (management team) and the Board
- Challenges in navigating between family members and non-family members
 - Board members and Family Office executives
- Creating the Foundations necessary for a successful Family Office
 - Mission/Vision/Values Statement
 - Governance Structures (including Board and liaison between the family and Board)
 - Long-Term Family Objectives/Strategic Plan
- Dealing with Family Conflict
 - How to avoid getting caught in the middle (non-family executive)
 - How to get involved without getting over-involved

Hiring, evaluating and managing outsourced advisors

- Mastering Request for Proposal (RFP) process
- Beyond product and price: how to put a dollar sign on service
- How to conduct comprehensive background checks
- Managing conflict of interest issues
- Knowing who is really working for you: ensuring the team you hired is doing the work
- Guaranteeing confidentiality in the working agreement
- Creating a collaborative advisory team that works together to achieve the family’s overall goals
 - Selection criteria
 - Service/Performance Metrics
 - Making a staffing change (if necessary)
 - Role of the Board and Family members with outside advisors

Workshop Leaders

Linda Mack, Founder & President, MACK INTERNATIONAL

Linda Mack is the founder and president of Mack International. Offering expertise in the wealth management industry, she personally conducts executive search assignments for global and domestic financial services firms. In addition, she brings over 25 years of financial services and wealth management industry experience having been a partner in the Global Financial Services practice of TMP Worldwide Executive Search and serving in senior executive positions at Harris Bank.

Dennis Jaffe, Advisor to Families on Family Business, Succession, Wealth and Philanthropy

For 35 years, Dr. Jaffe has helped family businesses deal with generational transitions, create effective management teams, design family retreats, and build healthy relationships. As both an organization consultant and licensed psychologist, Dr. Jaffe has created programs on executive development, mastering change, organizational values, career building, innovation and succession planning for companies all over the world. He is a founding member of the Aspen Family Business Group and also serves as a professor at Saybrook Graduate School and as Executive Director of SF State University’s Family Entrepreneur Center.

1:00 – 4:30* WORKSHOP C

Sustainability: Using Tactical Methods and Proven Methodologies for the Human Capital Component of Family Wealth Transfer

Without tools to successfully pass wealth from one generation to the next, all other topics become irrelevant. This workshop will provide you with tactical practices to perpetuate family values... and as a result wealth... for years to come.

- Integrating strategies for individuality into a cohesive family development plan
- Defining the costs and benefits of preserving wealth as a family
- Turning results from family meetings and mission statements into actionable, sustainable game plan
- Incorporating the viewpoints of those marrying into the family into the overall family plan
- Identifying and implementing scalable governance structures
- Identifying the decision-making and leadership questions that need to be addressed for both new liquidity and established families
- Managing the relationships within the family office: setting regulations for interactions between the CEO, the current family decision-makers, and future family leaders

Workshop Leaders

Fredda Herz Brown, Ph.D., Founder, Managing Partner and Senior Consultant, THE METROPOLITAN GROUP

In 1993, Fredda helped found The Metropolitan Group, LLC, an organization devoted to the education of and consultation with families who share assets, whether that be an operating company, a family office and/or a foundation. Fredda is a pioneer in the field of family enterprise. Her career in working with families who share substantial assets began almost twenty years ago after she completed a research project examining successful first to second generation transitions. Her research began at The Family Institute of Westchester, a world-renowned postgraduate training center in family systems work. In 2002, she was especially honored to receive the Beckhard award which acknowledges the recipient’s contribution to practice in the field.

Mark B. Rubin, Founder and Senior Consultant, THE METROPOLITAN GROUP

Mark Rubin’s previous involvement in expanding his own family’s retail men’s clothing enterprise gives him extensive insights into the diverse issues that families in business face. Formerly with Price Waterhouse for more than ten years, he specializes in assisting family enterprises in complex ownership situations, including leadership development, cross-generational ownership and management transitions and human resource planning. His expertise covers the retail, finance, entertainment, publishing, manufacturing/ distribution and real estate industries.

1:00 – 4:30* WORKSHOP D

Taking the Family Office to the Next Level: Blueprints for Expanding your Family Office

With a complete family office infrastructure and stellar staff in place, taking on other families to co-invest to spread around costs seems like a natural next step. However, the cultural and organizational complexities and compliance ramifications often make this move not worth it. This workshop will drill down into the details that must be considered before expanding the family office and set the plans if it’s a viable option.

Evaluating if expanding the family office is the right decision:

- Evaluating the metrics to determine which family office structure needs to be put in place
- Cultural issues to consider and managing expectations of original family in light of new client demands
- Liability and compliance issues

Steps for making the leap to an expanded multi-family office:

- Making effective partnerships: tactics for finding partners and creating a collaborative environment
- Critical communications and reporting obligations

Workshop Leaders

Carol Pepper, President, PEPPER INTERNATIONAL

Carol Pepper is President of Pepper International, a virtual family office located in New York City. Carol advises high net worth individuals on all aspects of their wealth, including asset allocation, investment manager selection, estate and tax issues, next generation issues and charitable giving. In addition, she acts as a consultant to global families in the creation of a family office. Carol was a private banker at JP Morgan Private Bank, Citibank Private Bank and Credit Suisse Private Bank and also manager over \$1 billion of private client assets as a Senior Portfolio Manager at Rockefeller & Co.

Thomas J. Handler, Principal, HANDLER, THAYER & DUGGAN

Mr. Handler serves as chairman of the Firm’s Advanced Planning and Family Office Practice Group. His primary area of expertise involves the analysis and structuring of complex business enterprises and estate plans and handling the related tax planning issues. Accordingly, he has extensive experience in the analysis, design, and implementation of domestic and international business planning, financial and estate planning, and advanced tax planning strategies. Mr. Handler’s experience includes public accounting and numerous corporate and foundation directorships. The Private Consulting Group, Inc. named him to the Wealth Strategies Design Team composed of 15 of the top wealth planning professionals in the United States. He is a life member of The National Registry of Who’s Who in America and has been named to Who’s Who in American Law. He has been actively involved in American, Illinois State, and Chicago Bar Association activities.

**All workshops will have a 15 minute break*

Instructional Workshop Day

MONDAY, JUNE 12, 2006



5:00 – 6:00
Family / Family Office Closed Door Information Exchange
Informal networking group for family members or executives of single family offices



5:00 – 6:00
Business Card Exchange for Advisors and Service Providers
Find out Who's Who at the Forum in this fun, facilitated session! Advisors and service providers will meet in small groups, introduce themselves and their firms, then move on to the next group. A great way to meet who you need to know before the start of the main conference.



6:00 Welcome Reception
All conference attendees are invited to attend the kick-off cocktail reception
Hosted by



Conference Day One

TUESDAY, JUNE 13, 2006



7:30 – 8:30 Family Office Closed Door Breakfast
Hosted by



7:30 *Registration & Morning Coffee*

8:30 *Opening Remarks*

Day One Conference Chair

Robert Bernstein, Managing Member,
PRISM GLOBAL ADVISORS, LLC
Founder,
PRISM PARTNERS, LLC

Mr. Bernstein is the founder of PRISM Partners, LLC a multi family collaborative, and Managing Member of PRISM Global Advisors, LLC, a private multi-strategy hedge fund. PRISM Partners provides specialized consultancy to institutions and family offices through a global collaboration with world renowned specialists in multi-factor risk analysis, asset allocation, sector/stock analysis, structured products, hedge funds, private equity, real estate and other Alternative Investments. Mr. Bernstein is also co-founder and managing member of Heller Bernstein & Associates. Prior to establishing PRISM, Mr. Bernstein spent 10 years as Managing Director, Head of the Global Emerging Markets at Brinson Partners / UBS Asset Management, where he managed more than \$5 Billion of client assets and was a senior member of UBSAM's Asset Allocation / Risk Management committee.

8:45 **Family Office Structures and Lifecycles: A Holistic View of the Industry Past, Present and Future**

A high-level look at how the industry is currently segmented, the factors behind its evolution and how to prepare for what's to come

Defining the myriad family office infrastructures

- Variations of the family office structure
- Understanding your family office identity: Characteristics of Financial and Operating Family Offices as well as families managing their own wealth
- How all the structures are interconnected and tie together for families
- Emerging protocol standards for Virtual Family Offices integrated with Multi-Family Offices
- A look at the trend of Single Family Offices contracting with Multi Family Offices: How often this is happening and the legal, personal and administrative challenges it presents

Within the Family Office

- Aligning the individual interests of family office advisors and service providers
- Capitalizing on strengths, minimizing weaknesses and defining values to protect family office best interest when dealing with outside advisors

New Paradigms, Alternatives, and Structures

- Tearing down of the old paradigms and looks at the emerging new alternatives now available to private families and family offices
- How to maintain privacy and control, and have a continuity plan in place when considering these options
- New structures for families to implement when setting up new or restructuring their existing family office service offering

Moderator:

Tom Livergood, CEO,
THE FAMILY WEALTH ALLIANCE
President,
FAMILY OFFICE MANAGEMENT, LLC

The Family Wealth Alliance's only business is educating, assessing and placing families of extraordinary means. Family Office Management is a leading consulting organization to firms serving the ultra-high net worth marketplace. It jointly conducts the annual MFO Studies with Bloomberg Wealth Manager. Livergood has 25 years of experience in the wealth management industry.

industry. Previously, he was the founding director of the Multi-Family Office Community for the Family Office Exchange, LLC (FOX) and was with the Harris Private Bank of Chicago during most of the 1990s.

Participants:

Thomas J. Handler, Principal,
HANDLER, THAYER & DUGGAN

Mr. Handler serves as chairman of the Firm's Advanced Planning and Family Office Practice Group. His primary area of expertise involves the analysis and structuring of complex business enterprises and estate plans and handling the related tax planning issues. Accordingly, he has extensive experience in the analysis, design, and implementation of domestic and international business planning, financial and estate planning, and advanced tax planning strategies. Mr. Handler's experience includes public accounting and numerous corporate and foundation directorships. The Private Consulting Group, Inc. named him to the Wealth Strategies Design Team composed of 15 of the top wealth planning professionals in the United States. He is a life member of The National Registry of Who's Who in America and has been named to Who's Who in American Law. He has been actively involved in American, Illinois State, and Chicago Bar Association activities.

Juan Meyer, Executive Vice President,
ASSET MANAGEMENT ADVISORS

Stuart E. Lucas, Principal,
CATAUMET PARTNERS

Stuart Lucas is CEO of Integrated Wealth management LLC, and Principal at Cataumet Partners, his family's investment office. He is also an heir to the Carnation Company fortune, started by E.A. Stuart. As Senior Managing Director with Bank One, he oversaw the firm's high-end private client business. He started his career at Wellington Management Company as Assistant Portfolio Manager of the Over-the-Counter Securities Fund, twice a Forbes Honor Roll fund during his tenure. He is Vice-Chairman of the NRP Foundation, holds an MBA from Harvard and is a CFA.

Teddie Ussery, Family Office Executive /Strategist,
SYNOVUS FAMILY ASSET MANAGEMENT

For the past 20 plus years, Teddie has worked to develop the Family Office concepts she manages by providing comprehensive asset management, financial and fiduciary services, as well as investment expertise for a broad range of portfolios. She is an expert in multigenerational family wealth management. Teddie's career has focused on managing diverse challenges, multiple priorities and vast opportunities of integrating family dynamics and intergenerational issues of asset and inheritance management, encompassing all facets of family administration.

9:45 **Global Asset Allocation Trends for the Investing Family**

- Where you should be allocating your capital – and areas to avoid
- Generating risk and return forecasts to develop long- and short-term investment strategies
- Benefits of global diversification in the family office portfolio
- The art and science of blending traditional and alternative investments
- The case for international equity investing in today's market
- Incremental risks associated with off-shore investing
- International regional and sector opportunities
- Enhancing alpha through international diversification
- Reducing risk through international diversification
- Putting it all together - optimizing strategy and manager selections
- Stress testing the portfolio

Moderator:

Barbara Hauser, Counsel,
CADWALADER, WICKERSHAM & TAFT LLP
Executive Advisor,
HARRIS PRIVATE BANK

Barbara Hauser, listed in Worth's "Top 100 Attorneys," has extensive experience advising wealthy families on all aspects of wealth transfer planning. While a partner at Gray Plant Mooty, she was recruited to work exclusively for one high profile founder and his family (the privately-held international conglomerate including Radisson Hotels, Carlson-Wagonlit Travel, TGI Fridays, Carlson Marketing, Radisson Seven Seas cruise line, etc.). She has been teaching at the University of Minnesota Law School, is Special Counsel at Cadwalader, Wickersham & Taft LLC and Executive

Advisor to the Private Wealth Group at Harris Private Bank. She also works with families on issues such as governance and education of the next generation. She is a member of ACTEC (International Estate Planning Committee), STEP (the English-based Society of Trust and Estate Practitioners), the International Academy of Trust and Estate Lawyers, Union Internationale des Avocats (President Emeritus of its International Succession and Tax Commission), and the New York Bar. Bloomberg Finance called her a “leading light” for families with cross-border holdings.

Panelists:

Lynette Schroeder, *Portfolio Manager*,
DRIEHAUS CAPITAL MANAGEMENT, INC.

Lynette Schroeder is the Portfolio Manager for the Driehaus International style and the Driehaus International Discovery Fund. Previously Ms. Schroeder worked in international research at Scudder, Stevens & Clark and at Lexington Management Corporation, before joining Driehaus Capital Management LLC as an international senior research analyst in June 1997. While employed by Driehaus, she was named portfolio manager for the Driehaus European Opportunity Fund in December 1998 and co-portfolio manager for Driehaus International Discovery Fund in December 1998. In July 2000, Ms. Schroeder joined American Century Investment Management, Inc., where she was a portfolio manager for the International Opportunities Fund until she rejoined Driehaus in March 2005.

John C. Bailey, *Chief Executive Officer*,
SPRUCE PRIVATE INVESTORS, LLC

Mr. Bailey is the founder of Spruce Private Investors, LLC; an absolute return investment boutique managing \$1.3 billion in assets for affluent individuals, family offices, and charitable institutions. The firm utilizes leading-edge proprietary systems for capital market forecasting, portfolio construction, risk management, manager selection and portfolio re-balancing. Spruce employs professionals from leading firms including Bridgewater, J.P. Morgan, GMO, Commonfund, PRINCO, MIT's Lincoln Laboratories, Bank of Bermuda, and several family offices. For sake of objectivity the firm does not accept soft dollars, receive marketing commissions, or enter into distribution agreements with managers. In 2002, Mr. Bailey was nominated “Family Office Executive of the Year” by Institutional Investor's Private Asset Management for his industry work on behalf of wealthy families. Prior to Spruce, John was the CEO of Family Office Services for a Connecticut-based multi-client family office where he was responsible for asset allocation and manager selection. He also advised wealthy families for a PIMCO-owned private trust company, the Columbus Circle Trust Company, and for the Capital Management Group of what is now Wachovia Bank. John began his career as a sell-side equity research associate at Oppenheimer & Company covering insurance stocks.

10:45 *Mid-Morning Break*

11:10 **Education of the Third Generation: Overcoming Common Pitfalls that Prevent the Perpetuation of Wealth**

- Using family wealth as a training ground for learning how money works
- Encouraging the interaction amongst siblings to establish continuity of family wealth management
- Family case studies

Kathryn McCarthy, *Independent Consultant*

Kathryn McCarthy has over 25 years experience managing the financial affairs of wealthy families and individuals. She is currently a consultant to families and family offices. She is also Director of the Rockefeller Trust Company. Kathryn was a Managing Director of Rockefeller & Co., a member of the Management Committee and Director of Client Advisory Services. She was the President of Marujupu, LLC, the family office of the Sulzberger Family and founded their family office. Kathryn also served as President and co-founded The Clifford Management Group and principal and co-founder of t Clifford/ Russell Inc. She serves on several private Family Investment Committees and serves on the board of directors of a family office. She was named “Family Office Executive of the Year” by Private Asset Management.

Kathy Wiseman, *Founder*,
WORKING SYSTEMS

Kathy Wiseman assists people to live, work and govern their family business, family foundation and family office. Her expertise is in merging two tracks: business skills and family systems. She is a faculty member at the Georgetown Family Center where she heads the educational and management programs for family firms and foundations. She is adjunct faculty at the George Washington University School of Business where she is heading the Institute for Succession. She served as a Dean of the Family Office Exchange Learning Academy, Chicago, Illinois and the president of the Family Firm Institute Education and Research foundation. As founder of Working Systems, Wiseman has provided consulting to 375 family organizations and individuals for over 20 years. Additional professional partnerships have given her other platforms to educate and coach executives, families, bankers, family office professionals and investment advisors.

Lee Hausner, Ph.D., *Vice Chairman. National Director, Family Enterprise Division*,
IFF ADVISORS

Lee Hausner served nineteen years as the senior psychologist for the Beverly Hills Unified School District and today is an internationally recognized clinical psychologist, business consultant and family wealth advisor. She is the co-author of a leading treatise on business succession planning, *Hats Off to You: Balancing Roles and Creating Success in Family Business Succession*. Dr. Hausner co-authored *The Founder's Guide to Family Foundations* published by the Council on Foundations. Author of many articles and books on the topic of wealth and family, she wrote the definitive work: *Children of Paradise: Successful Parenting for Prosperous Families*.

12:15 **Understanding the Psychology of Taxes on Investor Behavior**

- How to save money by working with the Alternative Minimum Tax
- Protect yourself from the IRS's increased scrutiny of the affluent
- Hear how an historian's perspective may change your dividend and capital gain strategies
- Learn how to avoid the secret tax on your investment interest expense
- How to think about charity and investments as an integrated plan
- An Income tax legislative update featuring the latest from Washington DC
- Introduction to a new psychiatric theory that resolves the conflict for investors who try to do long-term tax planning in a short-term political world

Speaker:

Mark J. Blumenthal, *Partner*,
BLACKMAN KALLICK

Mark Blumenthal is the Chairman of the Family Office Services group at Blackman Kallick. Mark serves as a strategic advisor to affluent families, family offices, mature private businesses and private equity/venture capital funds. He advises clients on buying, selling and investing in private companies and real estate; the formation of family and investment limited partnerships, family offices and private foundations; and income tax, transaction and wealth transfer planning. He has also acquired a national reputation for his unique family office practice. “Mark Blumenthal delivered the best tax presentation I have ever seen.” Ibis Investments (2005 attendee)

12:50 **Lunch**



SPECIAL KEYNOTE PRESENTATION

Steven D. Levitt
Best-selling Author of Freakonomics: A Rogue Economist Explores the Hidden Side of Everything

Steven Levitt is not your typical economist. He is a much heralded scholar who studies the stuff and riddles of everyday life and whose conclusions regularly turn the conventional wisdom on its head. Freakonomics establishes this unconventional premise: If morality represents how we would like the world to work, then economics represents how it actually does work. A full professor in the University of Chicago's economics department, Levitt was also the recipient of the American Economic Association's prestigious John Bates Clark Medal (given to the country's best economist under 40).

Levitt's address at Family Office Forum will literally redefine the way we view the modern world.

Track A	Fundamentals: Primers for new and perennial issues facing family offices
Track B	Investments: In-depth look at trends and outlooks for various asset classes
Track C	Beyond the Basics: Cutting-Edge topics gaining momentum in the family office industry

Attendees may alternate between tracks

2:15 – 3:10

Steps for Building Long-Term, Profitable Philanthropy Programs

- How to nurture philanthropy across the generations to ensure cohesiveness and focus on a common vision and mission and a set of goals
- Evaluating the spectrum of charitable giving structures available to suit a families' long- and short-term goals
- What is the latest in giving strategies to ensure that money is used effectively and has impact and is aligned with donor intent

Douglas Bauer, *Senior Vice President*,
ROCKEFELLER PHILANTHROPY ADVISORS

Doug leads the organization's Strategic Initiatives Team. Prior to joining Rockefeller Philanthropy Advisors in March 2002, he was a Vice President at Goldman Sachs and President of the Goldman Sachs Philanthropy Fund, the firm's donor-advised fund. Previously, Doug was Director of Community Partnership at SmithKline Beecham and Executive Director of the SmithKline Beecham Foundation where he focused on community-based healthcare around the world. Doug was a Program Officer for Culture at the Pew Charitable Trusts and he managed the Scott Paper Company Foundation.

Hedge Funds: Finding Talent and Opportunity in Today's Crowded Environment

Institutions, endowments and high net worth individuals have flooded the hedge fund market with capital. This has made it difficult for many to find quality managers, and has resulted in some strategies becoming overcrowded. This talk will show which hedge fund strategies are working, which are not, and which should be watched closely. It will discuss exactly where family offices should be looking for both talent and opportunity today, in order to preserve and grow their capital for the future.

Topics covered will include:

- Where is the 'smart money' going?
- Which funds are worth paying for
- Which strategies are overcrowded and which present opportunity
- Luck or Skill? Separating Alpha from Beta
- Fund-of-Funds vs. Multi-Strategy vs. Single Strategy
- What is the latest on the hot Asia, Energy, and Commodities sectors
- Tactics for identifying talent and opportunity

Jon Sundt, *President*,
ALTEGRIS INVESTMENTS

Mr. Sundt has been in the alternative investments industry for over 15 years. At Altegris Investments, his firm's clients currently represent a trading level of over \$1 billion in alternative investments, including managed futures and hedge funds. Prior to forming Altegris, Mr. Sundt served as Director of Managed Accounts and Senior Vice President of the Managed Investments Division of Man Financial He is the founder and President of International Traders Research Inc. (ITR), an Altegris affiliate that provides performance information on alternative investments worldwide.



C **Moving Portable Alpha onto the Family Office Radar**

- Large, sophisticated family offices are looking more and more into this primarily institutional-based concept: What you need to know about portable alpha and how... and when... you should get involved.
- The basics: Defining Portable Alpha
 - Evaluating your choices for Beta Exposure and Alpha Generation
 - Case Studies: Successful Portable Alpha scenarios and how to relate them to your situation
 - Implementation considerations: what to take to account before embarking
 - Understanding special concerns for taxable clients

Barbara G. Novick, *Managing Director*,
BLACKROCK
Ms. Novick heads Global Business Development, Marketing and Client Service, chairs the firm's Marketing Committee, co-heads the Fixed Income Operating Committee, is a member of BlackRock's Management Committee, and serves on several other operating committees. From the firm's inception, Ms. Novick was responsible for structuring and marketing BlackRock's mutual funds as well as managing several large portfolio restructurings for institutional clients and their regulators. Prior to founding BlackRock in 1988, Ms. Novick was a Vice President at The First Boston Corporation.

3:10 *Afternoon Networking break*

3:35-4:30

A **Benchmarking Your Family Office: How to Measure Success and Implement Metrics**

- Benchmarking will improve your ability to manage your family office and will enable you to describe the value-added more precisely to family members and other stakeholders.
- You cannot manage what you cannot measure! This introductory session will cover:
- Functional benchmark areas: investment support, fiduciary administration, and financial control
 - Examples of benchmarking in the family office
 - Benchmark quality and cost models for your own use

Jon Carroll, *Principal*,
FAMILY OFFICE METRICS
Before co-founding Family Office Metrics in 2002, Jon worked as an independent consultant with families to implement successful business practices, with a special focus on improving the back office operating environment and technology platform. From 1994 until its acquisition by SunTrust Banks, Inc in 2001, Jon was senior vice president and chief operating officer of the Florida-based \$1b multi-client family office AMA Holdings, Inc. and its subsidiaries, Asset Management Advisors LLC, Lighthouse Partners LLC, Teton Trust Company, and Abundance LLC. Jon served as corporate controller for the \$3b thrift subsidiaries of Ocwen Financial Corporation. Prior to Ocwen Financial Corporation, Jon's business experience spanned over 17 years in the financial services industry, with special emphasis in investment operations, technology, and management, including 11 years with Citibank NA.

B **Private Equity Opportunities for The Family Office**

- Using private equity to achieve long-term goals
- Return expectations
- Hot sectors in private equity: middle markets and beyond
- The family office perspective on private equity's role in the investment portfolio
- When making direct investments in private equity is appropriate... and precautions of how direct investments can go horribly wrong

Steven Hartman, *Managing Director*,
LEVINE LEICHTMAN CAPITAL PARTNERS
Mr. Hartman joined Levine Leichtman Capital Partners in March 1996 and is a member of the firm's portfolio management group participating in investment due diligence, negotiation of definitive documents and monitoring of portfolio companies. Prior to joining LLCP, he worked in the corporate finance department at Financiere Indosuez in Paris, France originating and structuring merger and acquisition transactions. From 1988 to 1990, he was a financial analyst at Lehman Brothers in the corporate finance department specializing in middle market transactions.

Daniel Furey, *Managing Director*,
HARBERT MANAGEMENT CORPORATION
Mr. Furey has over 15 years of investment management experience, previously holding several investment management firms including positions as a senior marketing officer at Executive Wealth Management, a director of business development for UBS Global Asset Management, and marketing for Merrill Lynch. Furey was also a member of the UBS Private Bank, Global Executive Group located in Zurich, Switzerland. He has worked in most areas of the United States and in Europe.

Dina McClung, *Head of Alternative Investments*,
TAUBMAN ASSET MANAGEMENT

C **A Look Abroad: Managing the Global Family Office**

- How global families managed wealth for generations and how to apply their lessons learned to the relatively new family office industry
- How US-based families can learn from concepts applied to managing European and Latin American family wealth
- Managing families spanning multiple nationalities and determining which jurisdiction is best suited for which investment vehicles
- Complexities of managing an on/ off shore family office

Carol Pepper, *President*
PEPPER INTERNATIONAL

4:35 – 5:30

A **Global Security for the Family: Protecting Family Members and Their Assets Around the Globe**

- Security for family members dispersed throughout the world: Identifying new risks encountered when individuals travel, work and live around the world
- Coordinating security efforts internationally
- Protecting wealth with foreign asset protection structures and plans
- Scams and frauds that high net worth individuals are susceptible to... and how to avoid them

Denis Kleinfeld, *Principal*,
THE KLEINFELD LAW FIRM
General Counsel, FOUR POINTS FAMILY OFFICE
Denis Kleinfeld serves as a strategic legal advisor to affluent families and closely held businesses on sophisticated national and international income tax, estate tax, investment and transaction planning, and asset protection planning matters. He is co-author of the two volume Treatise Practical International Tax Planning published by Practising Law Institute and is on the Editorial Board of Estate Planning Magazine published by Research Institute of America.

Michael Guidry Founder, *Chief Executive Officer*,
THE GUIDRY GROUP
Mr. Guidry is recognized worldwide as a leader and innovator in the field of security. Mr. Guidry has over 25 years of experience solving security problems for many of the largest and most prestigious companies in the world. His work has pioneered numerous innovative techniques saving hundreds of millions of dollars in lost revenues. Mr. Guidry's work in the security industry has led him to 96 different countries around the world.

B **Emerging Markets' Current and Anticipated Positioning in the Family Office Portfolio**

- Emerging markets exposure can provide significant return and diversification benefits to any portfolio. Evaluating the magnitude and timing of these exposures raises a number of questions.
- Emerging markets as a separate allocation in the portfolio vs. a portion of a broader international allocation
 - Characteristics of emerging markets equity and debt
 - A look at Alpha vs. beta exposure
 - Separating the tactical decision from the long-term allocation

Kevin Terhaar, *Managing Principal*,
STAIRWAY PARTNERS, LLC
Kevin is responsible for all aspects of the management of client accounts at Stairway Partners, an investment advisor focused on the management of diversified liquid portfolios for high net worth individuals. Prior to Stairway Partners, as head of Asset Allocation at UBS Global Asset Management, Kevin was responsible for the analysis of financial markets and the management of global multi-asset portfolios. Before joining Brinson Partners, the predecessor organization to UBS Global AM, he was the manager of investments for a family office in Ohio. Kevin has over 20 years of investment experience, holds BA and MA degrees from the University of Virginia, and is a CFA charterholder.

C **Understanding the Buzz Behind Premium Finance and When it's Right for the Family Office**

- Premium finance - a process where a lender pays an insurance premium to an insurer on behalf of an insured – has increasingly come on the family office radar, though few know exactly what it is and how it's used. This session will clarify the topic and give you an unbiased look at the landscape of products available to help you make the best decisions for your family office and family office clients.
- Defining Premium Finance
 - Determining in which situations its use is right... and when it is not the right solution
 - Beyond the basics: Advanced capabilities of premium finance

Paul L. Vogel, *Executive Vice President, Wealth Strategies*,
MILLENNIUM BROKERAGE GROUP
Previously Paul was practice leader of Arthur Andersen LLP's Private Client Services (PCS) group in Dallas/Fort Worth providing high-end estate, income tax, business succession, and financial planning to individual clients. He has been quoted as an authority on income tax matters by The Wall Street Journal and on financial planning/business succession issues by The Saint Louis Business Journal, LA Times, New York Post, Miami Herald, Newsday, Forbes, and Dallas Business Journal.

William L. Zelenik, CLU, ChFC, *Chief Executive Officer*,
MILLENNIUM BROKERAGE GROUP
Bill is the Chief Executive Officer of Millennium and is housed in the Millennium Home Office in Nashville. He is a Vanderbilt University graduate in economics and sociology. He has been in the life insurance business since 1976. Bill is currently a member of AALU, NALU and the American Society of CLU and ChFC. Bill is a registered representative of Tower Square Securities, Inc. and holds Series 6 securities license.

5:30 *End of Day One*



8:00 *Registration & Morning Coffee*

8:30 *Opening of Day Two*

Day Two Conference Chair

Fredda Herz Brown, Ph.D., *Founder, Managing Partner and Senior Consultant,*
THE METROPOLITAN GROUP

8:40 **Integrated Risk Management: Human capital, Insurance and Legal Risk Solutions**

- Identifying and understanding the categories of risk management and understanding the financial benefits of a holistic approach
- Determining the value of advice: why selecting products piecemeal based on price can lead to dangerous gaps in coverage
- Identifying when a family needs to move beyond the standard insurance product-driven paradigm
- Evaluating your family's risk exposures to determine the specific insurance coverages that correspond to your unique needs
- Assessing your risk management team and insurance representatives to ensure you and/or your client are comprehensively protected and not paying for unneeded insurance

Patricia LeBon, *Vice President,*

ACORDIA PRIVATE CLIENT RISK MANAGEMENT

With over 25 years of insurance brokerage experience, Ms. LeBon consults, designs and implements insurance programs for affluent individuals and family offices throughout the United States. She is a member of the Leaders Council of The Institute of Private Investors. Prior to Acordia, she was Director for AON Private Risk Management.

Michael J. Brink, CLU, *Executive Vice President,*
NEASE, LAGANA, EDEN & CULLEY, INC.

Michael J. Brink is Executive Vice President of Marketing for Nease, Lagana, Eden & Culley, Inc., an insurance advisory firm focused exclusively on wealth transfer planning for ultra affluent families and executive benefits for public and larger private companies. His firm is a Strategic Advisor to the Family Office Exchange and member of the Family Wealth Alliance. Prior to joining NLEC, Michael was Vice President and Regional Manager of a regional Bank Trust Company.

9:25 **Trends in Wealth Management: Who is Best Positioned to Serve the Family?**

Considerations in choosing among private banks, trust companies, brokerage firms, investment managers, multi family offices and single family offices

Then, the topics may be as follows:

- Examining the range of wealth management options
- Evaluating the importance of independence and advocacy; managing conflicts of interest in your wealth management relationship
- Factoring in other considerations, such as corporate culture, physical location, and size of practice
- Determining critical success drivers for your family
- Defining the scope of the engagement
- Negotiating fees for service and establishing an appropriate pricing methodology
- Setting parameters to judge relationship quality and satisfaction

Moderator:

Donna Gilding, *Chief Investment Advisor,*
LOWENHAUPT AND CHASNOFF

Participants:

Patricia Soldano, *President,*

CYMRIC FAMILY OFFICE SERVICES

Ms. Soldano has spent over 20 years managing family assets and has established family offices across the country, including for the Brown Family of California, the Plimpton Family of New Jersey and the Field Family of Illinois. She developed Cymric Family Offices Services into a multi-family office and since 1996 has been its owner. Ms. Soldano's principal responsibilities include directing and supervising all investment management and asset allocation issues, coordinating estate planning and generation succession efforts, and facilitating and implementing family meetings.

Mark F. Polzin, *President,*

MORELAND MANAGEMENT

Mark Polzin joined Moreland in 1989 after 18 years in banking, working in trust, investment, administrative and management positions. He has served on the boards of several trust and family office associations and is active in charitable and educational organizations.

Alanson B. Houghton, *Chief Investment Officer,*
SHELTERWOOD FINANCIAL SERVICES

Brenda B. Sallstrom, *Chief Investment Officer,*
CROSSWATER

Ms. Sallstrom has devoted her twenty-year career in investments to serving the complex financial needs of ultra high net worth individuals and families. Prior to joining Crosswater, Ms. Sallstrom was the Director of Family Office Strategies for U.S. Bancorp Piper Jaffray, where she successfully built a multi family office providing comprehensive wealth management services for taxable investors with net worth in excess of \$10 million. Ms. Sallstrom joined U.S. Bancorp Piper Jaffray from Tonkawa, Inc., the private family office of the owners of Carlson Companies, Inc., a global, multi-billion dollar hospitality, travel, and marketing company headquartered in Minnetonka, Minnesota. As Vice President, Investment Planning for Tonkawa, she had investment and financial management responsibility for legal entities representing a full spectrum of investment objectives and including securities from a wide variety of asset classes.

Wendy Warren, *CEO and Executive Director,*
BAHAMAS FINANCIAL SERVICES BOARD

10:25 *Mid-morning Break*

10:45 **Emerging Investment Analysis and Decision Making Solutions that Make Single and Multi Family Offices Customized and Scalable**

- Delivering usable analysis tailored specifically to the needs of the family office member
- Staying abreast of technological change and managing growth to maintain performance that your clients and families have come to expect
- New options in technology: beyond the traditional platforms
- Becoming fluent in multi-currency and multi-base reporting in an increasingly global world

Moderator:

Jon Carroll, *Principal,*
FAMILY OFFICE METRICS

Participants:

Christopher Snyder, *Chief Executive Officer and President,*
PRIVATE CLIENT RESOURCES

Mr. Snyder founded Loan Pricing Corporation in 1985. After selling LPC to Reuters in 1994, Mr. Snyder served as a special research consultant to JP Morgan, Chase in building the first Wall Street research department focused on the global syndicated loan marketplace. Earlier, Mr. Snyder was Group Vice President of DRI/ Standard and Poors. He also served in the Office of the Secretary of Defense at the Pentagon as a Captain in the United States Air Force. Mr. Snyder received his Ph.D. in economics and statistics from Lehigh University, where he was an NDEA fellow.

Amit Choudhury, *Managing Director,*
PINNACLE PARTNERS

Rhona Vogel, *Founder,*
VOGEL CONSULTING GROUP

Rhona Vogel is a Certified Public Accountant and licensed investment advisor with over 25 years of professional experience. She formed Vogel Consulting Group in 1993; it currently works with over \$2.5 billion of managed and unmanaged assets.

11:45 **Structured Products in Alternative Asset Classes: The Next Wave in Investing**

- Historical evolution of derivatives and leveraged structured products
- Why interest in these markets is shifting from institutional investors to the high net worth individuals and why they are considered to be poised as hedge funds were 20 years ago
- What makes an investment strategy right for family offices and high net worth individuals
- Applying successful European family wealth investment approaches to the more aggressive nature of North American high net worth individuals

Robert Bernstein, *Founder, Managing Principal,*
PRISM GLOBAL ADVISORS

Steven Braverman, *Director,*
BRAVERMAN FAMILY PARTNERSHIP

Managing Director,
TAHOE ADVISERS

Steve and his family are the lead members of a 10 family multifamily office. Growing from the common bond of a successful public company founded by Steve's father Neil, their family office leverages the expertise of in-house accounting and legal functions, as well as consolidated banking and investment management relationships. The office now covers four generations of wealth and oversees almost \$1B in combined assets. The core competence of the office is in investment management and financial engineering, focusing of the development of derivative solutions for families of wealth; this specialty is offered via the office's affiliation with Steve's firm, Tahoe Advisers, of which he has been managing director since its inception.

12:35 **Lunch**

Track A	Financial Family Office Sessions designed for fully functioning family offices and those who work with such family offices
Track B	Operational Family Office Issues specific to family offices that currently maintain operating businesses and those who work with such family offices
Track C	General Family Wealth Topical issues affecting the wealth management of high net worth individuals

Attendees may alternate between tracks

1:40 – 2:35

A Alternative Investing Due Diligence : Understanding its Limits and What it Can – And Can't – Protect you From

- Determining if the Family Office should have due diligence be done in-house or outsourced
- A high level view of an asset manager's investment strategy.
- Inside the Numbers: Determining if reported performance indicative of past client performance
- Regulatory guidelines regarding due diligence
- The pros and cons of qualitative and quantitative due diligence
- Special considerations for Family Offices regarding due diligence
- Paperwork that Matters: Principals, Regulatory Filings, Partnership Agreements, Employment Agreements, Offering Memorandum, and more.



- A**
- Service Providers and other Conflicts of Interest, including Auditors, Custodians, Investment Contracts, Pricing, Fee Calculations and Soft Dollars

John Noddings, President,
NLP INVESTMENTS, INC.

Mr. Noddings is President of NLP Investments, a firm specializing in managing convertible arbitrage strategies. While receiving his Computer Science degree from Rice University in 1989 he developed advanced software for evaluating convertible securities at Noddings Investments. He has managed convertible investment strategies, written analysis software, managed an affiliated brokerage firm and co-authored The International Handbook of Convertible Securities.

Jeff Blumberg, Parnter,
GARDNER CARTON & DOUGLAS LLP

Mr. Blumberg is a member of the firm's Corporate Law Practice Group. His practice concentrates primarily on representing and advising sponsors of unregistered investment funds organized both in the United States and offshore. He provides counsel regarding regulatory, organizational, structural and business matters for his clients.

Matthew Osborne, Vice President & Chief Investment Officer,
ALTEGRIS INVESTMENTS

Mr. Osborne brings 20 years of business and financial-market experience to his role at Altegris Investments. He leads the research team's efforts to discover new alternative investments, such as hedge funds and managed futures, and oversees the due diligence process. Prior to forming Altegris with Jon Sundt and Robert Amedeo, Mr. Osborne was Director of Research for Man Financial's Managed Investments Division in La Jolla, California. Before moving to the United States, Mr. Osborne had a 12-year career with a preeminent family office in his native New Zealand. In his role as Investment Manager he was responsible for formulating investment policies and implementing a global asset allocation program that specialized in alternative investment strategies, such as hedge funds and managed futures. He also gained significant trading expertise in foreign currencies, stocks, fixed income, global futures and options. In his role as Corporate Treasurer for the family's manufacturing company, he was responsible for risk management in interest rates and foreign currencies as well as debt portfolio management.

B Tax Planning for the Family Operating Business

- Specific tactics for minimizing taxes whether a family is starting new businesses, working to grow a maturing business, or moving a family business toward liquidity
- Using business and investment diversification to reduce income taxes and create wealth transfer opportunities
- Balancing growth and exit planning and understanding income and wealth transfer tax
- Planning for business growth as future generations take the reins

Michael Hearne, ROTHSTEIN KASS

C Negotiating Financing Options for “Boys Toys”: Guide to Keeping Management of Private Jets and Other Luxuries Under Control

- How to best take advantage of changes in legal developments and tax legislation
- Buyers beware: How not to be taken advantage of when purchasing luxury goods, including fractional ownership of aircraft
- The ins and outs of fractional ownership arrangements and how to determine if this is the best option for you
- Developing a safety checklist: Safety concerns when entering an agreement with a third-party operator

TBD, BOMBARDIER FLEXJET

2:40 – 3:25

A Pricing Strategies for Multi-Family Offices: How to Make Money in this Increasingly Crowded Field

Despite the trend of multi-family offices popping up everywhere, many are finding that making money in this business is more difficult than you think. Implementing the right pricing model can make or break the business. In this session, you'll learn about the various pricing options, how to determine which structure is right for your business model and goals and how to increase your bottom line.

Dale E. Veitch, Partner,
LEXINGTON FAMILY OFFICE, LLC

Mr. Veitch has had over 15 years of experience in the financial services industry, having started an independent wealth management firm recognized by Bloomberg Wealth Management in 2001 as one of the top 100 independent investment advisory firms in the country. In 2001 he formed a multi-family office which today has become Lexington Family Office Services, where he acts as the Family's CFO/Family Liaison. In addition Mr. Veitch takes monitors the strategic plan over time and educating all generations on the impact the family's wealth will have on their individual lives.

Christopher Snyder, Chief Executive Officer and President
PRIVATE CLIENT RESOURCES

B Navigating the Shift from Family Business to Family Office: the Liquidity Event and Beyond

- Creating and preserving cohesion across the family before, during and after the liquidity event
- Dealing with the drastic changes in family circumstance brought about with the sale of the family business
- It's not just a financial decision: Determining if it's the right time for the liquidity event

B Marc A. Silverman, Ph.D., *Family Business Consultant,*
STRATEGIC INITIATIVES, INC.

Dr. Silverman brings over 15 years of experience in Family Business Consultation, Succession Planning, Corporate and Family Governance including Boards of Directors, Family Councils and Family Protocol. He serves on the Board of Advisors to Association of Organization Development of Latin America and was President of the International Organization Development Association for nine years. Dr. Silverman has consulted to family businesses for close to 30 years. He has worked with a broad range and size of families and businesses nationally and internationally, and has trained and worked as a family therapist and worked in his own family's business.

C Socially Responsible Investing: What it is, What it isn't, and How to Make its Returns Exceed Expectations

- Overview of various SRI approaches and vehicles
- Why certain approaches work for some family offices more than others
- Using SRI to take an activist role in investing

Diana Proper de Callejon, General Partner,
EXPANSION CAPITAL PARTNERS

Diana has been working in the field of Socially Responsible Investing (SRI) for more than fifteen years. Diana's specialty is private equity investments that deliver significant environmental benefits. Prior to Expansion Capital, Diana was a founder and Managing Director of EA Capital, where she worked with Fortune 500 companies, financial institutions, high net-worth clients, and foundations to identify new business and investment opportunities related to resource efficiency and productivity, and the environment.

After the afternoon breakout sessions, attendees will reconvene to hear a unique presentation and receive first print edition of groundbreaking research

3:25

Estate Planning for the Post-transition Period... The Emerging Need (and Opportunity) for Affluent Families and their Professional Advisors

After interviewing 3,250 families, researchers at the Williams Group have identified the reasons why 2/3 of the families lose their assets and family unity after the estate transitions. This session will detail what can be done by families (and their professional advisors) to avoid this tragic statistic from occurring in their family.

Learn how preparing heirs and heir families for their post-transition wealth and responsibilities presents one of the largest growth opportunities for professionals to serve their clients. The Family Office Forum is the first place you'll hear the data, problems, and remedies for this uncharted field!

Free Book!

The new book on Post-Transition Planning will debut at the Family Office Forum and a pre-press complimentary copy will be provided to each attendee at the conclusion of this presentation!

Vic Preisser, Co-Founder,
THE WILLIAMS GROUP

Vic Preisser applies his 40 years of business and government experience to family ownership issues, focusing upon the development of career paths for family members/heirs. With eight companies where he served as CEO or Senior Management, two state level cabinet appointments, and three family-owned businesses within his own family, Vic brings a breadth of practical experience that has proven essential to family coaching. Vic manages the Business/Mentoring side of The Williams Group practice, and previously served as the Director of the Institute for Family Business and Resident Professor of Management at the University of the Pacific.

Roy Williams, Co-Founder,
THE WILLIAMS GROUP

Roy Williams is the acknowledged Dean of (Estate) Post-Transition research and planning. He is a pioneer in the art of assisting high net worth families to meet the challenges following the transfer of wealth from one generation to the next. Within The Williams Group, he heads up the professional practices Division working directly with successful families to ensure a smooth estate transition. He was awarded a doctorate by the California School of Professional Psychology in recognition of Roy's 30 years consulting with families on the crucial role of trust and communication in a successful family business and the transfer of wealth.

4:10

End of conference

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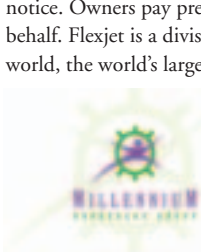
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NLP Investments is a St. Louis based investment advisory firm specializing in highly quantitative hedging strategies involving convertible bonds and warrants and their underlying common stock. Mathematically undervalued convertibles provide the foundations for NLP's different strategies. These strategies, first developed by the firm's CIO, Thomas C. Noddings, in the 1960s, have been continuously updated since that time via hands on investing and documented through writing ten financial books with the assistance of others in the firm. The strategies are designed as alternatives to traditional investments ranging from money market to small cap stocks for institutional and high net worth investors.



Private Client Resources, LLC offers a consolidated financial reporting service to the Ultra Wealthy Community. Our service gathers all asset information including alternative investments and personal use assets such as homes, and boats that often represent a significant portion of wealth. PCR gathers data manually and electronically at the transaction level, standardizes, reconciles and publishes it daily. The web based reporting tool allows users to produce a variety of customized reports.

Rothstein Kass

Our Family Office Group provides financial and administrative services to family offices, business owners and high-net worth individuals, including members of the entertainment/sports community. Services include financial reporting; tax planning/preparation and coordination of estate, trust and private foundations; personal concierge services and bookkeeping; and business succession planning. Comprised of CPAs and other professionals, we execute our responsibilities with the utmost courtesy and discretion, allowing clients to be confident that their personal finances are in capable hands.

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HOTEL



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Soaring 46 stories into the downtown Chicago skyline amid the world-famous shops and restaurants on Michigan Avenue, the Chicago Marriott Downtown Magnificent Mile rises to every occasion. Whether you're on a business trip, attending a meeting, or just getting away, the hotel puts you in the middle of it all. Host your meeting or social event in our 60,000 sq ft of versatile function space. Or, just retire here after a long day of business or shopping along the Magnificent Mile. And, since we have 3 restaurants and lounges, you don't even have to leave the hotel to satisfy your appetite or gather with colleagues. You'll love the stylish and contemporary upgrades we've made to our guest rooms and suites during our recent \$15 million renovation. Everything from sleek desks to flat-screen TVs, cozy beds and vibrant artwork reflects the timeless charm of Chicago. The views from our rooms are even more glorious now. Whether you're here with a group or by yourself, you'll be treated as if you're our only guest.



CONFERENCE DETAILS

Who Should Attend and Whom Will I Meet at the Family Office Forum?

The Family Office Forum aims to create a balanced environment between family offices and the outside advisors family offices look to who help them meet their wealth goals.

- Single and Multi Family Office members and executives, including Presidents, CFOs, CIOs, COOs, legal counsel, and human resources representatives
- Family office consultants and advisors
- High net worth individuals and their representatives
- Family Business executives and advisors
- Private banking and trust executives
- Tax and Accounting specialist
- Alternative investment professionals
- Insurance executives
- Foundation & Endowment representatives

What attendees said about the 2005 Family Office Forum:

“Provided a better understanding of the unique dynamics of family office vs. wealthy individuals.”

Dolores Wheless, Frost Bank

“Panels were energetic, informative, useful with personal experience relevant to the discussion.”

Kristen Ogdon, The Ogdon Partnership

“Great keynote presenters... Everyone was raving about it!”

Elizabeth Whitlow, Harris Private Bank

“Great overviews on family dynamics... provides tools to make our operations work more efficiently”

Dale Ueitch, Lexington Family Office

“Learned to better educate family members about benefits of the family office and better ways to organize the family office”


Chief Counsel, CM Capital Group

“Attend to better understand family office responsibilities and opportunities”


Paul Navetta, Dan’s Excavating

“Overall program content was excellent... I got a better understanding of how other firms provide family office services.”

Barbara Weakly, Driehaus Captial Management



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Special thanks to our 2006 Advisory Board for their guidance while planning the Family Office Forum:

Robert Bernstein, PRISM Partners / PRISM Global Advisors

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 MAIL: IIR NY, P.O. Box 3685, Boston, MA 02241-3685

 EMAIL: register@iirusa.com

 WEB: familyofficeforum.net

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Please contact Aloycsia Bellillie at (212) 661-3500 ext. 3702 for details. No two discounts can be combined.

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The standard fee for attending IIR's Family Office Forum 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. Payment is due within 30 days of registering. If registering within 30 days of the event, payment is due immediately. Payments may be made by check, Visa, MasterCard, Discover, Diners Club or American Express. Please make all checks payable to the “Institute for International Research, Inc.” and write the name of the delegate(s) on the face of the check, as well as our reference code: U2120. If payment has not been received prior to registration the morning of the conference, a credit card hold will be required.

Dates and Venue

June 12-14, 2006
Marriott Downtown Magnificent Mile
540 North Michigan Avenue
Chicago, IL 60611

Accommodations


A block of rooms will be held for a limited period of time at the Marriott Downtown Magnificent Mile 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.

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Should you be unable to attend for any reason, please inform IIR IN WRITING prior to May 29, 2006 and a credit voucher for the full amount will be issued which must be used within one year of issuance. 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 May 29, 2006.

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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.



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