



Tuesday, March 10, 2015

7:00 am – 7:45 am	Exhibits Open	Exhibit Setup	
7:30 am– 7:00 pm		Hospitality Lounge / Exhibit Hall / Meeting Rooms Open	
7:30 am– 7:00 pm		Registration Open	
7:30 am – 8::15 am		Networking Continental Breakfast	
7:45 am – 7:55 am		Co-Chair Opening Remarks ASTON PEARL COOPER FAMILY OFFICE (SFO)	
7:55 am – 8:15 am		KAGIN'S GOLD & RARE COIN ADVISORS	
8:15 am – 9:00 am		A New Day; a New Model: How to Structure your Family Office for Success and Minimize The Governments Hold. Moderator: VOGEL CONSULTING (MFO) Panelists: PEPPER INTERNATIONAL (MFO) HANDLER THAYER, LLP	
9:00 am – 9:45 am		Investment Styles and Strategies: The role of alternative investments in your portfolio Moderator: HIGHLINE WEALTH MANAGEMENT (MFO) Panelists: POLAR SECURITIES	Philanthropy Moderator: THE WEALTH AND FAMILY OFFICE MANAGEMENT GROUP Panelists: ASTER FAMILY ADVISORS (MFO)

9:45 am – 10:30 am		Real Assets Moderator: GREENWAY FAMILY OFFICE (MFO) Panelists:	Tax Efficient Investing: How Ultra-Affluent Families Utilize Private Placement Insurance Structures. <ul style="list-style-type: none"> • An overview of the products and how they work • How families use these private placement products as part of their overall investment • How investment managers, private banks, and multi-family offices offer their investment services within these insurance products Moderator: CHALKSTREAM CAPITAL GROUP (MFO) Panelists: SALI FUND SERVICES & PRINCIPAL, WINGED KEEL GROUP GOLUB CAPITAL FORESTER CAPITAL, L.L.C.
10:30 am – 10:45 am		Networking Refreshment Break Sponsored by:	
10:45 am – 11:45 am		Real Estate Moderator: THE STRATEGIC GROUP OF COMPANIES Panelists: CUSTOMERS BANK BEACON ASSET MANAGERS SUNBELT LAND MANAGEMENT	Fixed Income / Credit Moderator: DELEGATE ADVISORS (MFO) Panelists:
11:45 am – 12:30 pm		Private Equity Moderator: TAG ASSOCIATES (MFO) Panelists: GENSPRING FAMILY OFFICES (MFO)	Liquid Alternatives Moderator: Panelists:

12:30 pm – 1:15 pm		Direct Investing / Co-Investing: Going Back to the Roots Moderator: THE LAUGHREN GROUP (SFO) Panelists T5 EQUITY PARTNERS LLC (SFO)	Emerging and Frontier Markets Moderator: Panelists:
1:15 pm – 2:30 pm		Networking Luncheon	
2:30 pm – 3:15 pm		Energy: Moderator: Panelists:	Equity Investing Moderator: Panelists:
3:15 pm – 4:00 pm		Navigating the challenges of the trustee/beneficiary relationship <ul style="list-style-type: none"> • The top challenges in the trustee/beneficiary relationship • How the roles of trustees impact the lives of beneficiaries • How beneficiaries impact the duties of trustees • Balancing both sides of this vital relationship for the benefit of both Moderator: GREYCOURT & CO., INC (MFO) Panelists: TIEDEMANN WEALTH MANAGEMENT, LLC (MFO) WEALTH LEGACY ADVISORS LLC	Investing in Non-Correlated Assets: The best practices moving forward Moderator: Panelists:
4:00 pm – 4:45 pm		Tracking Your Investments - What and How Should You Monitor Moderator: KEEL POINT ADVISORS (MFO) Panelists:	New investment trends for investing in Emerging Managers Moderator: COOPER FAMILY OFFICE (SFO) Panelists: WOLFSON GROUP (SFO)

4:45 pm – 5:30 pm		<p>Risk measurement to risk management: Things to consider in your asset allocation practices</p> <p>Moderator:</p> <p>Panelists: J.I KISLAK INC. (SFO) MERCER, LLC SWISS TRUST ADVISORS CHINA</p>	<p>Impact Investing & Social Enterprises</p> <ul style="list-style-type: none">• How do you define impact investing? What has your experience in this space been?• How has this part of the industry evolved over the past decade?• What are some of the challenges for impact investors to consider? What are some misunderstandings that exist in the marketplace about impact investing?• How can an interested impact investor get started?• What kinds of resources are available to investors in impact investing and what advice would you give them? <p>Moderator: MANCHESTER CAPITAL MANAGEMENT (MFO)</p> <p>Panelists:</p>
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5:30pm – 6:15 pm		<p>(TBA)</p> <p>Moderator:</p> <p>Panelists:</p>	<p>Governing for Sustainability: Navigating Succession in the Family Office</p> <p>Family offices go through a series of transactions and transitions during their lifetime, which may beckon the question of how best to govern for long-term sustainability. Succession may not always occur as planned or intended when unexpected life events (death, divorce, and illness) or unforeseen macro-events (market volatility, unexpected sale of a business, etc.), and considering a contingency plan for the unforeseen may be prudent. This panel tackles best practices for governing for sustainability in the family office and keys to successful succession-- both ownership and leadership. From creating continuity plan to understanding inclusive shared decision-making; this panel will discuss practical, first-hand experiences and processes to govern the family office for the long-term</p> <p>Moderator: TAMARIND PARTNERS INC.</p> <p>Panelists: RAYLIGN ADVISORY GENSPRING FAMILY OFFICES, LLC (MFO) VERITAGE FAMILY OFFICE LIMITED (MFO)</p>
6:15 pm – 7:30 pm		<p>Networking Cocktail Reception</p> <p>Join us and unwind with fellow industry professionals for refreshments during our last networking break of the day.</p> <p>Sponsored By: KAGIN'S GOLD & RARE COIN ADVISORS</p>	