

The CIO Summit



August 6th, 2015

Marriott East
Side, New York

A Full-Day Conference Featuring 30+ Endowment, Pension Funds & Family Office CIOs; Sharing Best Practices, Investment Mandates, and Current Allocation Models

THE CIO SUMMIT

Dear Colleague,

August 6th, 2015

Our focus for this year's family office events is to promote a collaborative, relationship-building environment where family offices can share insights and resources, partner together on deals, and improve their operations with the help of their peers. The CIO Summit is a great way to kick off that theme by bringing several single and multi-family office CIOs and portfolio managers all sharing best practices, investment models, and risk management strategies. This is an exceptional opportunity for fund managers and investment executives to learn how family office CIOs devise allocation strategies, manage risk, and evaluate performance.

If you have attended one of our past workshops, you know we bring together a great audience of industry leaders, family office executives, specialists, investors, and families. The CIO Summit is one of several family office conferences we are hosting this year, including our two-day, 2nd Annual Super Summit in Miami on December 1-2.

In 2015, we offer the following themed family office workshops:

Single Family Office Summit: At this February 9th event, attendees heard from top single family offices on best practices and strategies for investing, operating, and starting a single family office.

Direct Investment & Deal Flow Summit: This May 8th program brought together direct investors, dealmakers, and private businesses. Attendees discovered the step-by-step ways of how family offices are attracting deal flow while still being discreet and private, and what standards are being followed while conducting due diligence on potential acquisition targets.

The CIO Summit: On August 6th, join us for a full-day dedicated to the CIOs that manage family office portfolios. Hear the views of top family office CIOs on market trends, wealth management strategies, and capital preservation in today's economy.

Real Estate Allocator Summit: The Second of a back-to-back conference series, the Real Estate Allocator Summit on August 7th, this event features 30+ family office and institutional investors discussing how they buy real estate, what they look for in a real estate investment, the deal structures that they prefer, and how they view the market going forward.

Family Office Super Summit: Join us December 1-2 for a two-day Family Office Super Summit in Miami features 60+ speakers, \$1B+ family offices, dozens of single family offices, and hundreds of delegates

I look forward to seeing you at one of our family office gatherings in 2015.



Richard C. Wilson
Founder & CEO
Wilson Conferences

The CIO Summit

August 6th, 2015 | NYC | Marriott East Side

SPEAKERS

Here is the preliminary speaker lineup for The CIO Summit . Be sure to check WilsonConferences.com/CIO/ for updates to the agenda and speaker lineup. See you in New York.



Thaddeus R. Shelly III
Tiedemann Wealth
Management



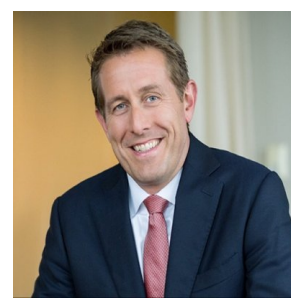
Michael Sury
Indorus Holdings LLP



Leah Zveglic
Aster Family Advisors



Christina Conners
Greenway Family Office



Douglas Getty
Abbot Downing



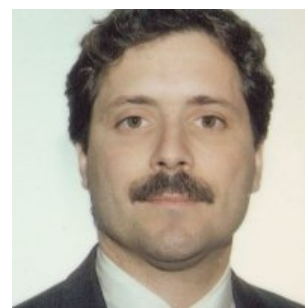
Candice Beaumont
L Investments



Avi Gelboim
Scher Capital Management



David Paige
Legal Fee Advisors



Sergio Pedro
Jones Family Office



Will Braman
Ballentine Partners, LLC



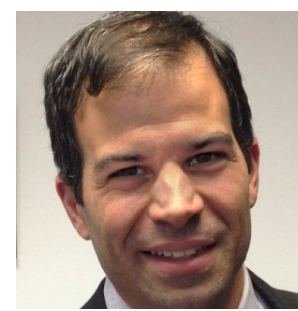
Ben Parr
Captivology



Henley Smith
Senior Oppenheimer & Co.



John Jonson
Lyrical Partners



Jonathan M. Bergman
TAG Associates



Irina Tanenbaum
The Juilliard School



Ted Seides
Protégé Partners



Richard C. Wilson
Billionaire Family Office



Carol Pepper
Pepper International



Robert Russell
Avenue Capital



Peter Pell
CSM Capital Corporation

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AGENDA

9:00 Opening Remarks by Richard C. Wilson, CEO & Founder, Billionaire Family Office

9:20 *Seeding Investment Managers: What Goes Into Identifying Talent*
John Jonson, Managing Director, Lycrical Partners

9:35 *International Family Collaboration*
Leah Zveglich, Managing Director, Aster Family Advisors

9:50 *Discussion: The CIO Resource Toolkit: Strategies, Best Practices, and Tools for the Resource Constrained*
Panelist: Sergio Pedro, Jones Family Office; David Paige, Legal Fee Advisors; Irina Tanenbaum, The Juilliard School

10:45 *Best Practices in Identifying Manager Alpha and Value*
Michael Sury, Executive Director, Indorus Holdings LLP

11:00 *Why is Volatility Reduction an Appropriate Risk Mitigation Practice*
Thaddeus R. Shelly II, Managing Director, Tiedmann Wealth Management

11:15 *Discussion: Hedge Fund Investing – Identifying Winners, Evaluating Allocations, and Capturing Alpha*
Panelist: Avi Gelboim, Scher Capital Management; Robert Russell, Avenue Capital Group; Ted Seides, Protégé Partners

12:00 Lunch and Break for Open Networking

1:00 *Discussion: Early-Stage Investments & VC: How to Value Young Companies and Increase Batting Averages*
Panelist: Will Braman, Other panelists to be announced soon

1:45 *Best Practices: CIO's Role in the Set-Up & Running of a Single Family Office*
Carol Pepper, CEO & Founder, Pepper International

2:00 *Discussion: Wealth Preservation vs. Seeking Alpha*
Panelist: Candice Beaumont, L Investments; Douglas Getty, Abbot Downing; Jonathan M. Bergman, TAG Associates; Henley Smith, Oppenhiemer & Co.

3:00 *Unicorns 101: Billion-Dollar Private Company Trend*
Ben Parr, Co-Founder & Author, DominateFund

3:15 *Discussion: Real Estate & Hard Asset Investment Allocations - Where to Invest & Through What Vehicles?*
Panelist: Peter Pell, CSM Capital Corporation, Other panelists to be announced soon

THE CIO SUMMIT

Thank You To Our Sponsors

We would like to thank those sponsors and media partners who
have made the Annual CIO Summit possible



B M G



Family Office Club

Interested In Becoming A Sponsor For Future Events?

We offer Sponsorship Opportunities to a select few firms who would like to introduce their offerings to our large network of investment professionals and family offices. If you are looking to establish your presence in the family office space, we can provide you with an excellent venue for meeting potential clients, marketing your firm, and becoming a "household name" in this industry.

Email Alissa@WilsonConferences.com for more information on sponsorship options and pricing.

BOOKING FORM

The CIO Summit

New York
Marriott
East Side

August 6th

2015 Family Office Conference Series



Wilson.Conferences

Single Admission

New York | Aug. 6th, 2015

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BOOKING DETAILS

Charter Membership Pass

Includes admission to all of our conferences and more benefits.
(\$385 Initiation, \$197 Monthly)

The CIO Summit | August 6 | NYC

~~Standard: (\$1,195)~~ Early-Bird: (\$995)

Real Estate Allocator Summit | August 7 | NYC

~~Standard: (\$1,195)~~ Early-Bird: (\$995)

Family Office Super Summit | Dec. 1-2 | Miami

~~Standard: (\$1,295)~~ Super Early-Bird: (\$875)

Single Family Office Summit | March 2016 | NYC

~~Standard: (\$1,195)~~ Super Early-Bird: (\$875)

PAYMENT DETAILS

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