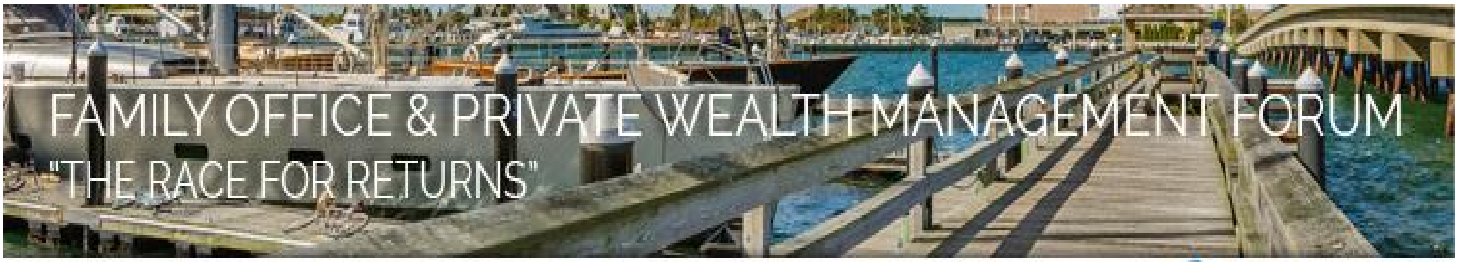

July 18-20, 2016 - Hyatt Regency Newport, Newport, RI

Opal Group

Monday, July 18, 2016

8:00 am	**AMERICAS REGATTA CUP NETWORKING EVENT** **(shuttle service begins at 7:15 am)** **Boat Sponsors include:** **Avesta** **Cross Ocean Partners** **Direct Lending** **Jefferies LLC** **Lodging Opportunity Fund REIT**
8:00 am – 12:00 pm	**Exhibit Set-up**
8:00 am	**Registration**
9:00 am	**Exhibit Hall Open**
9:00 am	**Hospitality Lounge Open** **(May be used for 1-1 meetings)** **Sponsored by:** **Jefferies LLC**
9:30 am	**Open Workshop** **Catch the current, Make the Wave; Be impactful** **Keynote Speaker** **Chairman and CEO, McGovern Capital LLC**
10:30 am	**Open Workshop and Boxed Lunch** **In Conjunction with Family Office Networks** **It's the Supply Side of the Economy, Stupid** **Keynote Speaker** **President and CEO, The Lindsey Group**

11:50 am		**Chairman Opening Remarks** **Presented by:** **Partner and Director of Private Wealth Practice, Conway Investment Research / Sunpointe Investments (MFO)**
12:10 pm		**Global Market Outlook** **CFA, Chairman and CEO, Clough Capital Partners, LP**
12:30 pm		**Investing in Rare Color Diamonds for value and appreciation** • Understanding the product and market. • Forces which influence value. • Exit Strategy to capitalize on the product. In this session, Scott West will invite you to learn more about the concentrated wealth of Natural Color Diamonds. What makes them so rare and valuable, the range of reasons why people are collecting them, and an exit strategy of how to sell the diamonds and capitalize on the market. Speaker: **Partner, Scott West®**
12:50 pm		**Opportunistic & Agile Hands-on Management Income & Growth** **Chairman, Lodging Opportunity Fund REIT**
1:10 pm		**Seeking Double-Digit Yields without taking Triple-C Risk** **Head of Global Reasearch, CreditSights**

1:30 pm		**A Global Macroeconomic Outlook and Forecast: Looking at the 2016 Presidential Election and the Future of the Global Economy** Moderator: **CEO, Bawden Family Office (SFO)** Panelists: **Madison S. Wigginton Professor of Finance Owen Graduate School of Management Professor of Law, Vanderbilt Law School, Vanderbilt University, Former Chief Economist and Division of Economic and Risk Analysis (DERA) Director, Securities Exchange Commission (SEC)** **Executive Director, The McCain Institute for International Leadership, Former United States Permanent Representative, NATO** **President, Aftershock Publishing, LLC, Author, *Aftershock* and *Aftershock Investor*** **Co-founder and CEO, Peak Prosperity**	
2:30 pm		**Keynote Presenter** **Former Director, Central Intelligence, Chancellor, Institute of World Politics, Chairman of the Leadership Council, Foundation for the Defense of Democracies**	
3:10 pm		**Networking Refreshment Break** **Sponsored by:** **Clough Capital Partners, LP**	
Tracks		**Track A – Brenton Hall**	**Track B – Rose Island Hall**

3:30 pm		**New Alternative Investment Strategies: The Demand for a Higher Level of Portfolio Diversification and Efficiency**
		• How should investors of significant wealth think about diversification today?
		• How much diversification is too much?
		• What are the benefits and pitfalls of diversification?
		• Efficient portfolios are those said to provide the greatest expected return for a given level of risk, or conversely the lowest level of risk for a given expected return.
		• How do these 'new' alternative investments figure into the mix? How should investors evaluate them in the context of an efficient portfolio?
		• How should investors think about alternatives in terms of their overall asset allocation?
		• How should investors evaluate/select 'new' alternative investments? What should they focus upon?
		• How should investors evaluate the performance of any investments they make in these alternatives?
		• What are the defining characteristics or unique risks associated with these new alternative investments?
		• What are the 'best practices' that you feel investors would do well to consider or adopt when sourcing or selecting 'new' alternative investments?
		
		Moderator:
		Ernest Dawal, Chief Investment Officer, SunTrust Bank & GenSpring Family Offices, LLC (MFO)
		
		Panelists:
		Senior Vice President, Product & Market Strategy, Backstop Solutions Group
		CEO, CMG Life Services Inc.
		CEO, The O'Donnell Group
		Founder and CEO, Keiretsu Capital
			Cyber Security
			With cyber security dominating the headlines, how should families and advisors prepare for the unanticipated and often unimaginable?
			• Understanding the nature of the risk - how stolen data is used (and resold) and the rise in "ransom ware"
			• Designing Appropriate Security Protocols to Match Processes
			• Preparing for All Contingencies
			  o Inadvertent breaches
			  o Deliberate breaches
			  o Educating all users
			• Cyber security in an RFP Process
			• Use of Private Servers (!) and Domains
			• Actions in the event of a breach (it will happen, just a question of when!)
			• How threats to infrastructure from EMPs and hybrid warfare can affect your cyber security planning
			
			Moderator:
			Co-founder and CEO, Wealthaven, LLC (SFO)
			
			Panelists:
			Executive Director, EMP Task Force on National and Homeland Security
			Chief Information Officer and Senior Managing Director, representing Rockit Solutions & its parent company Fi-Tek
			CEO, TruShield
			Executive Vice President, Aon Risk Solutions

4:30 pm		**Thinking Outside the Box - Investing in Non-Correlated Alternative Assets:** • With increased globalization are there assets that are truly uncorrelated? • Do strategies really exist that are uncorrelated, can provide downside protection and generate real returns? • What alternative asset classes are well suited for the current market environment? • Is the hedge fund party over? If not, where are the opportunities? • What about Renewable energy? Precious metals? Infrastructure? Real estate? Real assets? Life settlements? Venture? • Can a niche within the same industry perform very differently? • When you consider alpha, does investing in private or direct alternatives offer a premium significant enough to warrant the perceived or real risks associated with these investments? Moderator: **Director, Bronfman Rothschild (MFO)** Panelists: **Founder & CEO, Spruce Investment Advisors LLC** **President, Clean Energy Advisors** **Vice President and Portfolio Manager, OppenheimerFunds, Inc.** **Senior Managing Director, Vida Capital, Inc.**	**Real Estate in Private Equity** • Underwriting the sponsor: Because the "Who" is just as important as the "What" • Where is the smart money heading in 2016? • Cusp of another bubble? Are we getting overheated in multiple asset classes? • Individual projects or diversified fund investments? What is best for your family? • Asset Management: How can PE funds extract better returns with better management? • Deal Flow: How can your family office secure access to the best opportunities? Moderator: **General Counsel; Real Estate & Tax Advisor, The Strategic Group of Companies** Panelists: **Founder & Managing Principal, DVO Real Estate** **Executive Vice President, Heitman** **CFA®, Managing Director, Research, AEW Capital Management, L.P.** **Chief Financial Officer and Chief Operating Officer, Menlo Equities**

5:30 pm		**How to structure your family office: A strategic planning mechanism for family offices.** • Structuring Issues When Setting Up a SFO • Structuring Issues in the Existing SFO • Best Structuring Practices Moderator: **CEO & Founder, Pepper International LLC (MFO)** Panelists: **Chairman, Greycourt & Co. (MFO)** **Partner & Chairman of Advanced Planning and Family Office Practice Group, Handler Thayer, LLP** **Executive Vice President and Principal, Owens Group Insurance**	**Traditional Real Estate Investing** • Real Estate Allocation as part of a well balanced portfolio • Do recent articles and commentaries overstate the frothiness of today's market? • Investing in a rising cap-rate environment • Repositioning of assets as a core investment strategy • Repositioning in prime and urban markets • Repositioning in secondary markets • Does institutional investors' bias towards ultra- core assets represent a buying opportunity in other areas? • Crowd Funding for Real Estate: Is it finally mainstream and is it a good fit of your family? Moderator: **Director, Client Advisory Group, Windrose Advisors** Panelists: **Manager, RealOp Investments** **President & CEO, Westmount Realty Capital, LLC** **Partner, CapFundr | Hamilton Real Estate Capital**
6:30 pm – 7:30 pm		**Networking Cocktail Reception** Join us and unwind with fellow industry professionals for refreshments & hors d'oeuvres. **Sponsored By:** **CreditSights**	

Tuesday, July 19, 2016

7:00 am – 8:30 am	Exhibits Open	**Continental Breakfast** **Sponsored by:** **Direct Lending Investments**
7:00 am– 7:00 pm		**Registration / Exhibit Hall / Meeting Rooms Open**

<table>
<tr><td>7:00 am– 6:30 pm</td><td></td><td colspan="2">Hospitality Lounge Open
(May be used for 1-1 meetings)

Sponsored by:
Jefferies LLC</td></tr>
<tr><td>General Session</td><td></td><td colspan="2">Brenton Hall - General Session Room</td></tr>
<tr><td>7:30 am – 8:30 am</td><td></td><td colspan="2">Open Workshop to All Attendees

Rational or Irrational: How is your decisions-making process affecting your investment outcomes?
This applied behavioral finance workshop presents an opportunity to learn about key behavioral biases in real-time that affect the investment decision making process. Attendees of this interactive session will work through mini-case studies on investment decision-making that will highlight the most common behavioral biases. Investors who do not examine how their decision-making affects investment process may be at a significant disadvantage and achieve potentially sub-optimal outcomes. The moderators of this panel are experienced practitioners who have written four books on applied behavioral finance and a professional lecturer in the financial education realm.

Facilitator:
Partner and Director of Private Wealth Practice, Conway Investment Research / Sunpointe Investments (MFO)
Executive Vice President & Director, Cannon Financial Institute</td></tr>
<tr><td>8:30 am</td><td></td><td colspan="2">Opening Remarks - Brenton Hall - General Session Room

Partner and Director of Private Wealth Practice, Conway Investment Research / Sunpointe Investments (MFO)</td></tr>
<tr><td>8:40 am</td><td></td><td colspan="2">Direct Lending to Small Businesses: Unlevered, Double-Digit Returns

Speaker:
President and Portfolio Manager, Direct Lending Investments

Interviewed by:
Managing Principal, Slifka Asset Management (SFO)</td></tr>
<tr><td>Tracks</td><td></td><td>Track A – Brenton Hall</td><td>Track B – Rose Island</td></tr>
</table>

9:00 am		**Private Equity and Venture Capital – opportunities and threats** • With more firms and capital chasing large the same or fewer deals, is now a good time to invest in PE? Does size matter? Will large outperform small? The opposite is true historically in public markets. • Family Offices are more involved in direct deals. Do they have different holding periods and return objectives than institutional Private Equity players? • Where are the best opportunities in Private Equity and Venture now? • Tech Venture's obsession with Unicorns: a viable strategy or attempt to justify fund sizes? • Who will be the natural buyers for the large illiquid asset portfolios of the mega PE firms, Blackstone, Apollo, Carlyle, etc. now that banks are out and sovereigns and pensions are investors in those funds? Moderator: **Chief Investment Officer, Socius Family Office (MFO)** Panelists: **Chief Executive Officer, Drum Capital Management** **Managing Partner, Network Society Ventures** **President and CEO, Churchill Asset Management**	**Investment Opportunities in Hedge Fund Strategies** • Why have hedge funds, in general, been struggling to perform? • How have due diligence methods changed over the past year? • What specific hedge fund strategy/sector is positioned to outperform in the next few quarters? Which should be avoided? • Should families consider "alternative or smart" beta strategies? • Have fund terms (e.g., fees, gates, liquidity) been more flexible? Should they be? How can families negotiate the best deals? Moderator: **Chairman, INDORUS Holdings LLP (SFO)** Panelists: **Managing Partner & Portfolio Manager, Makalu Fund Management** **Founder and CIO, Carmot Capital LLC**

<table>
<tr><td rowspan="2">9:45 am</td><td rowspan="5">Exhibits Open</td><td>Opportunities in Private Credit
• Why look beyond "traditional" Fixed Income investments?
• What is Private Credit?
• What are the key investable areas of Private Credit (Commercial Finance, Consumer Finance, Real Assets)?
• What unique strategies are available in Private Credit?
• How should an investor choose a Private Credit manager?

Moderator:
Chief Investment Officer, The Laughren Group (SFO)

Panelists:
CEO, Gapstow Capital Partners
Managing Director, Garrison Investment Group
Managing Partner, Lateral Investment Management
CEO, Directed Capital</td><td>Insurance Dedicated Funds: How Families Invest in Hedge Funds and Other Asset Classes Tax Efficiently…
• What is an Insurance Dedicated Fund (IDF)?
• State of the Market? Global and Strategic Developments in the Space
• Estate Planning Implications of these structures and other practical applications
• PPLI/PPVA Frequently Asked Questions
• What investment strategies make sense in an IDF?
• How do I get started?

Moderator:
Managing Partner, Worth Venture Partners

Panelists:
Vice President, Goldman Sachs Asset Management
Senior Managing Director, Lombard International
Sales Vice President, Zurich American Life Insurance Company
Managing Director, Head of Marketing and Investor Relations, Echelon Asset Management</td></tr>
<tr></tr>
<tr><td>10:45 am</td><td colspan="2">Networking Refreshment Break
Sponsored by:
3EDGE Asset Management</td></tr>
<tr><td>General Session</td><td colspan="2">Brenton Hall - General Session Room</td></tr>
<tr><td>11:00 am</td><td colspan="2">Finding Undervalued Assets in a Low Return Environment

Founder, President and Chief Investment Officer, 3EDGE Asset Management</td></tr>
<tr><td>11:20 am</td><td></td><td colspan="2">Director of Corporate Sales, eVestment</td></tr>
</table>

11:40 am		**Family Office CIO Roundtable** • How do you see changes in your responsibilities in light of larger compliance considerations and more depth to the globality of the market place—i.e. Brexit Wake? • We all know it is impossible for person to place funds with even a handful of managers, what is your specific system for vetting managers? • There are a lot of new family offices following exits from core businesses that are at this event for the first time, what words of wisdom as CIO would you give them? • What areas of the market are you most interested in, private or public and what is your best idea you are willing to share • What experience do you feel the position of CIO requires and what skill sets would you emphasize for those considering hiring someone in that capacity • What managers that trade the public markets are more appealing to you at this time • What specific strategies are you using for direct trading of the market and or for collaboration for the allocations that you make • Are there any reservations about the conditions of the market given the uncertainties of the elections coming up, any repeating themes to watch for • Do you consider yourself a pioneer in finding new managers/strategies or are you more conservative in your process • What is the most important element that makes you a good CIO with market longevity Moderator: **Director of Investments, CI Investments (SFO)** Panelists: **CEO, Cooper Family Office (SFO)** **President/Chief Investment Officer, Statim Holdings, Inc. (SFO)** **Managing Partner and CIO, Delegate Advisors (MFO)** **Vice President, Mantucket Capital (SFO)** **Director of Investment Research and Strategy (CIO/CCO), O'Brien Management, LLC (SFO)**
12:45 pm		**Networking Luncheon**
General Session		**Brenton Hall - General Session Room**
2:00 pm		**Keynote Presenter** **The Investigation of the Wolf of Wall Street** This presentation will take you inside the actual FBI investigation of Jordan Belfort, the self-proclaimed "Wolf of Wall Street." You'll hear intimate details of Belfort's rise to prominence and how the FBI subsequently brought down one of America's most notorious boiler-room stock fraudsters. **Founder & CEO, Coleman Worldwide Advisors, Special Agent, (Retired), FBI, New York**

Split Tracks		Track A – Brenton Hall	Track B – Rose Island Hall
2:30 pm		**Marketplace Lending** • Best of Class Managers: Where are the opportunities, where are the risks? • Worldwide View: How Brexit impacts the opportunity set. • Maximizing risk adjusted returns through deal structure. • Lending Club: How lending clubs speedbumps impact the opportunity set. Has the environment changed, and if so, do greater opportunities exist? Moderator: **Managing Principal, Slifka Asset Management (SFO)** Panelists: **Alternative Finance-Research Advisor, University of Cambridge** **Managing Director, Macquarie Capital** **CIO, Echelon Asset Management** **Principal, Chief Credit & Risk Officer, A10 Capital, LLC**	**Investing in The Cannabis Industry** • Private vs. Public? • Ancillary non-regulated businesses vs. regulated "touching the plant" business investments? • Importance for cannabis to be part of your investment portfolio • What are additional diligence items and risks important for investing in this business category? • Should I invest in a fund or into specific companies as a direct investment? • What are the ranges of opportunities both domestically and internationally? Moderator: **Founding Partner, Salveo Capital** Panelists: **Partner, Pepper Hamilton LLP** **Chairman & CEO, Canopy Growth** **Co-Founder and CEO, MedMen**

3:30 pm		**The Entrepreneur and Philanthropist as Catalyst for Change** • Why are we doing this? How should we deploy resources to do the most good? • Solutions Vs Performance: Big Bets; Rigorous Systems, under collateralized leverage. • Reasons for giving: social obligation or financial motivation to improve talent attraction, morale, and retention; • Innovation and Legacy; two inseparable entrepreneurial objectives for forthcoming generations. • Theory of Values today to accommodate change in future demand as possible paradigm shifts. • Strategic and operating structures employed by entrepreneurial philanthropist to accomplish their vision. • An APP for Philanthropic Entrepreneurs: How might millennial philanthropists allocate and direct assets? • Cases as samples of motivations and values that drive entrepreneurial philanthropist Moderator: **Principal, Raire Family Office (SFO)** Panelists: **VP, Foundation Consulting & Management, Sterling Foundation Management** **Vice President of Philanthropic Services, Jewish Communal Fund** **Senior Managing Director, Foundation Source** **Philanthropic Advisor, Rockefeller Philanthropy Advisors**	**Investing in the Evolving Real Asset & Energy Market:** This panel will examine the real assets and energy markets including, timber, precious metals, land mitigation, and oil and gas exploration. • Is there a magic strategy which will provide steady stable returns that outperform traditional equities? • Which strategies should families consider within the energy/hard asset space? • How can we identify managers who will diversify returns from mainstream portfolios without adding additional risk to the portfolio? Moderator: **CIO, Ferguson Family Office (SFO)** Panelists: **CFA, Director of Research & Investment Strategy, ALPS Portfolio Solutions** **Founder & CEO, Tierra Resource Partners, LLC** **Vice President of Investor Relations, Forestland Group** **Executive Vice President and Director, US Energy Development Corporation**
4:30 pm		**Networking Refreshment Break** **Sponsored by:** **eVestment**	

4:45 pm		**Impact Investing 2.0: Investing with Value and Purpose** • Investing is Habitual as much as Analytical • UN PRI – Responsible Investor Movement • Portfolio Approach and Asset Allocation - We aren't trying to do anything different than traditional space • Impact Investing - Long term consequences of what we should have been doing all along • PRI (Program Related Investments) - Direct investing for specific impact and how you actually make it happen • Risk Management – The academics side, opportunity exists, a way to address biggest problems we face globally • Why Shareholder Engagement must be part of the solution and you should demand as an investor • We will give you concrete examples in renewable energy, health, education and more across asset classes • Engaging the Next Generation - Not if but when and doing it in a in meaningful way Moderator: **Managing Director - Impact Investing, Align Impact** Panelists: **Fellow, Initiative for Responsible Investment, Harvard University** **Senior Advisor, The Bill and Melinda Gates Foundation** **Partner, Capricorn Investment Group LLC** **Principal, The Seminole Companies**	**Direct Investing / Co-Investing: The Family Office Perspective** • What is your strategy and what makes it unique opposed to other investments i.e stocks, bonds. • What are your investment criteria when looking at an investment? • How do you find deals? • What is your DD process like? • Are you passive or controlling investors? • Are there any key trends that investors should be wary off? • Families are doing more direct investments. Do you guys allow direct investments? • What is the process? Are there advantages vs. disadvantages compared investing in funds? • What are some of the deals that went wrong and what did you learn? Moderator: **Senior VP / Investment Committee, Cheltenham Investments (SFO)** Panelists: **Managing Director, T5 Equity Partners LLC (SFO)** **Director of Strategy and Private Equity, Elm Court Partners (SFO)** **Founder / Managing Director, Hub Angels Investment Group, LLC** **Managing Director, City Capital Ventures**

5:45 pm		**Investing in Growth: New Strategies for Investing in Emerging and Frontier Markets** • Brexit- How will it impact the Emerging Markets genre? • Will the Zika virus stultify any chances of growth in Emerging Markets • Which emerging markets provide the best current opportunities and why? • Are there ways to invest in emerging markets while moderating risk? • What should I look for when selecting an Emerging Markets manager? • We invested in Emerging Markets Private Equity pre-financial crisis and still haven't gotten our capital returned. Why should we double down now? • Should I invest in EM via passive or active vehicles? • What approach makes sense, GEM portfolios or a collection of country/regional specialists? • What are the pros/cons of investing in EM via private equity? Moderator: **President, Coomber Family Estates (SFO) / Dragon Trust Family Office (SFO)** Panelists: **Chairman & CEO, Privos Capital** **Chief Investment Officer, US Endowments and Foundations, Mercer Investment Consulting Inc** **Chairman, Lalcap Ltd. (UK)** **Managing Director, The Rohatyn Group**	**Investing in Technology** • Positive Deal Selection - What advantages and disadvantages do SFOs and MFOs have for getting into and vetting the best deals? • What are the best practices? • How to build Relationship Capital and an ecosystem like the best tech investors. • Deal Attributes - How to balance and diversify a portfolio yet leverage strengths in region, industry, tech sector, and investment stage • Disruption - of the IPO market, of valuations, of growth equity, of every industry. How disruption can play to long-term trends and strengths. Moderator: **Partner, Alpha Venture Partners / Pritzker Group Venture Capital** Panelists: **Founder and CEO, XLP Capital / Stack Family Office (SFO)** **Founding Partner, Venture Science** **CEO, Keiretsu Capital**

6:45 pm – 9:30 pm		**Summer Social Bash Reception** **Join us and unwind with fellow industry professionals for Live Music, Great Food, & Refreshments during our networking party.** **(Registered Guests ONLY)** **Featuring Live Music:** **Global Impact Award Presented to:** **Ambassador R. James Woolsey, Former Director, Central Intelligence, Chancellor, Institute of World Politics, Chairman of the Leadership Council, Foundation for the Defense of Democracies** **Sponsors include:** **Sterling Foundation Management** **Keiretsu Capital** **Echelon Asset Management**

Wednesday, July 20, 2016

7:30 am	Exhibits Open	**Continental Breakfast** **Sponsored by:** **Rodeo Capital**
8:00 am – 2:00 pm		**Registration / Exhibit Hall / Meeting Rooms Open**
8:00 am – 2:00 pm		**Hospitality Lounge Open** **(May be used for 1-1 meetings)** **Sponsored by:** **Jefferies LLC**
7:50 am		**Welcoming Remarks**

8:00 am	**Women in Wealth Management: Innovation, Creativity, and What It Means for Clients and the Industry** • Secrets to success: big new ideas and innovations • Does gender matter? And how? • Rising to the top: challenges and obstacles • Lasting impact on clients and the industry • Wealth Transition: What changes lie ahead? • Glass or Cement Ceiling? • Do women invest differently than men? • Gender Speak: does it matter? Moderator: **President & Founder, Chapin Hill Advisors, Inc** Panelists: **Executive Director and COO, Gonzalez Family Office (SFO)** **Managing Director, L Investments (SFO)** **CEO & Founder, Vogel Consulting (MFO)**
8:45 am	**SVN CEO, Rodeo Capital**
9:05 am	**Vice President, Strategy and Business Development, Broadridge Financial Solutions, Inc.**
9:25 am	**An Active Manager Looks At Indexation** **Chairman & CIO, Horizon Kinetics LLC**
9:45 am	**Engaging the Next Gen to Be Stewards of the Family Legacy** Speakers: **Chair, Education Committee, Perdue Farms (SFO)** **Family Chair Council, Pitcairn (MFO)** Interviewed By: **Founder, The Rudin Group**

10:30 am		**Knowing When to Make Your Move: Managing Volatility & Risk to Maximize Investment Returns** • Risk? What Risk?" Risk is more than volatility. • Net under the High Wire?" Protecting portfolios against volatility. • No, Wait, I Can MAKE Trading?" Investing in volatility. • I Am Carnac the Magnificent?" Prognosis for markets, near and longer-term. Moderator: **Senior Wealth Advisor & Portfolio Manager, Keel Point (MFO)** Panelists: **CFA, Chief Investment Officer, Pathstone Federal Street (MFO)** **Vice President, Financial Advisor, CAPTRUST** **CFA, Director – Portfolio Management, TAG Associates LLC (MFO)**

11:15 am		**A Conversation: Can Trusts still benefit my Family?**
		• Why create a Trust?
		  o Asset protection
		  o Special needs
		  o Dynastic thinking
		  o Taxes
		• Where should I set up my Family's Trust?
		  o Favorable jurisdictions
		  o Unfavorable jurisdictions
		  o Factors to consider
		• Who should be trustee of our Trust?
		  o Individuals
		  o Corporate Trustee
		    ▪ Large institution
		    ▪ Independents
		  o Private Trust Company
		
		Moderator:
		Trustee, Chair of Finance Committee, The Episcopal Diocese of Pittsburgh
		
		Panelists:
		CEO and Founder, Wealth Legacy Advisors LLC
		President & CEO, Willow Street Group (MFO)

12:00 pm		**Shared Family Decision Making: Best Tools and Practices for Family Offices of the Future** Many families have to consider a new rubric of decision making after the founder's passing. This panel will share some of the various tools, structures and best practices of shared family decision making that helps a family of wealth and their family offices endure. From family councils, family meetings, committees and boards of directors, this panel will highlight some of the opportunities for continuity and longevity that family governance provides. This panel will key into current trends, and new insights to family governance including aspects of leadership, succession, grooming next generation family members and passing the baton. This panel of first class industry experts will share their experiences on how family governance may help build bridges across generations to achieve long-term sustainability and continuity of the family and its wealth. Moderator: **Founder, Tamarind Partners Inc.** Panelists: **Managing Director of Governance and Education, GenSpring Family Offices (MFO)** **Global Family Advisor, Barbara R Hauser LLC** **Founder, Impactful Conversations** **Founder & Managing Partner, RayLign Advisory, LLC**

1:00 pm		**Private Closed Door Family Office Luncheon** **Family office and multi –family offices ONLY** This private, closed-door session is designed exclusively for foundations, family offices, multi-family offices, non-discretionary consultants and accredited high-net worth individuals. Opal is committed to enhancing experiences and interaction for Families and Family Offices and is consequently dedicating an extended session to them. Peer-to-peer conversation on key issues for participants, which will depend on interest, and may include: • Next generation education and succession • Family communication and decision-making • Asset allocation and investing in a challenging environment • Single family office structure • Cybersecurity • Lessons learned and best practices Participants are expected to share experiences, thoughts, concerns, challenges, and solutions in a private peer exchange setting. The session will be a facilitated, interactive, dynamic conversation among the participants. **No managers or service providers will be allowed in the session, no exceptions.** Facilitator: **CEO and Founder, Aston Pearl** **President and Founder, Mack International, LLC**
3:30 pm		**Closing Remarks**