

FAMILY WEALTHREPORT

FAMILY OFFICE SUMMIT

Integrating the Full Balance Sheet: From Investment to Lifestyle Management

Dear Guest,

In the next episode of our annual autumn Family Office Summit series, we will examine the wealth strategies family offices can deploy to ensure their members' well-being in the fullest sense and across generations, covering not only wealth accumulation and transfer, but also life or lifestyle concerns such as education, healthcare and security.

DISCUSSION TOPICS

- Future-Proofed Investment Plans
- Lifestyle Management (Private Aviation, Residences, Education, Healthcare)
- How Philanthropy is Changing
- Optimizing the Family Office Formula
- Wealth Management Options for the UHNW: Can any firm truly satisfy their needs over the long term?

KEYNOTE SPEAKERS:



CHARLES LOWENHAUPT
CEO of Lowenhaupt Global Advisors, discusses his latest book outlining the challenges facing wealth inheritors and the missteps wealth creators should avoid when transferring wealth.



MICHAEL W. SONNENFELDT
Founder of TIGER 21 will be discussing his entrepreneurship, philanthropy and experiences with his premier peer membership organization for high-net-worth wealth creators.

TO REGISTER FOR THIS EVENT PLEASE VISIT OUR **WEBSITE** OR FOLLOW THIS **LINK**

THURSDAY - NOVEMBER 1, 2018 / 8:00 am – 6:00 pm
VENUE: Pepper Hamilton, New York Times Building, 37th Floor, 620 Eighth Avenue - New York, 10018-1405

AMONGST OUR SPEAKERS:



JOE CALABRESE
National Head of Investments
Key Private Bank



MEL LAGOMASINO
Managing Partner and CEO
WE Family Offices



MAURA CUNNINGHAM
Founder and Executive Director, Rock the Street, Wall Street



STEVE PROSTANO
Founder and Managing Partner
SPI Partners



ANDREW HULSH
Partner
Pepper Hamilton LLP



BILL WOODSON
Managing Director
Citi Private Bank



KIM LAUGHTON
President
Schwab Charitable



MICHAEL FELMAN
President and CEO
MSF Capital Advisors



JAMIE McLAUGHLIN
Founder and Chief Executive
J. H. McLaughlin & Co.



RANDY PARRISH
Head of Credit
Voya Investment Management



FRAZER RICE
President
Wealth Actually



GEMMA LEDDY
Partner-in-Charge
PKF O'Connor Davies Family Office



SUSAN SOFRONAS
Managing Director
Geller and Company



WALTER SWEET
Senior Vice President
Rockefeller Philanthropy Advisors



CHRISTOPHER SIDFORD
Founder and Medical Director
Black Bag



FORD VON WEISE
Global Head of Aircraft Finance
Citi Private Bank



ARTHUR BAVELAS
Founder, CEO
Bavelas Group Family Office and Family Office Insights



DAVID NORTON
Partner and Head of Aviation Practice
Shackelford Bowen McKinley & Norton

For questions about the event, please contact:
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Partner

Pepper Hamilton LLP
Attorneys at Law

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SUMMIT AGENDA

- 8:00 *Registration and Breakfast*
8:55 *Summit Opening and Welcome*
- 9:00 **KEYNOTE 1: *Entrepreneurs and Their Children***
• Michael Sonnenfeldt, Founder, TIGER 21
- 9:40 **PANEL 1: *Future-Proofed Investment Plans***
• Michael Felman, President and CEO, MSF Capital Advisors
• Carol Pepper, CEO & Founder, Pepper International
• Arthur Bavelas, Managing Partner, BavelasGroup
• CHAIR: Andrew Hulsh, Partner, Pepper Hamilton
- 10:30 *Morning Break*
- 11:00 **PRESENTATION 1: *A Deep-Dive on Global Divergence***
• Randy Parrish, Head of Credit, Voya Investment Management
- 11:20 **PANEL 2: *Lifestyle Management and Mastering its Many Moving Parts (Private Aviation, Residences, Education and Healthcare)***
• Frazer Rice, President, Wealth Actually
• Susan Sofronas, Managing Director, Geller & Company
• Ford von Weise, Global Head of Aircraft Finance, Citi Private Bank
• CHAIR: Tom Burroughes, Group Editor, ClearView Financial Media
- BREAKOUT ROOM: *Why Specialty Fixed Income May be a Wise Bet* - Presented by: Voya**
• Randy Parrish, Head of Credit, Voya Investment Management
- 12:10 **PRESENTATION 2: *Hot Topics for Business and Private Aviation: What do you mean that's an illegal charter – everyone does it that way!***
• David Norton, Partner and Head of Aviation Practice, Shackelford, Bowen, McKinley & Norton
- 12:30 *Lunch*
- 1:30 **KEYNOTE 2: *The Wealth Inheritor's Dilemma and Freedom From Wealth***
• Charles Lowenhaupt, Chairman and CEO, Lowenhaupt Global Advisors
- 2:10 **PANEL 3: *How Philanthropy is Changing***
• Maura Cunningham, Founder, Rock the Street, Wall Street
• Kim Laughton, President, Schwab Charitable

- Walter Sweet, Senior Vice President, Rockefeller Philanthropy Advisors
- CHAIR: Rebecca Meyer, Consultant, Relative Solutions

BREAKOUT ROOM: *Emergency Medical Intelligence: What will save your life?* - Presented by: Black Bag
• Christopher Sidford, Founder and Medical Director, Black Bag

3:00 *Afternoon Break*

- 3:30 **PRESENTATION 3: *Optimizing the Family Office Formula***
• Gemma Leddy, Partner in Charge - PKF O'Connor Davies Family Office
• Marc Rinaldi, Partner in Charge- Financial Services, O'Connor Davies

BREAKOUT ROOM: *Automating and Personalizing Balance Sheet Reporting for Global Family Offices – It's All About The Data* - Presented by Private Wealth Systems
• Craig Pearson, CEO, Private Wealth Systems

- 4:00 **PANEL 4: *Wealth Management Options for the UHNW: Can any firm truly satisfy their needs over the long term?***
• Mel Lagomasino, Managing Partner and Chief Executive, WE Family Offices
• Bill Woodson, Managing Director, Citi Private Bank
• Joe Calabrese, National Head of Investments, Key Private Bank
• Steve Prostan, Founder and Managing Partner, SPI Partners
• CHAIR: Jamie McLaughlin, Founder and CEO, J.H. McLaughlin & Co.

4:55 *Summit Summary & Close*
5:00 *Cocktails*

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