MONDAY, JULY 22, 2019

7:30 AM	**AMERICA'S CUP REGATTA NETWORKING EVENT** **7:15 am - 8:30 - Shuttle Service begins** **8:00 am - Breakfast & Registration** **8:30 am - Departures for 12 Meter Racing Boats** **8:45 am - Departures for Viewing Boat** **11:00 am - Boats Return & Return Shuttle Service** **Boat Sponsors include:** **Keiretsu Capital** **LIMITED SPACE AVAILABLE. ADVANCED REGISTRATION REQUIRED.**
8:00AM	**Exhibit Set-Up**
8:00 AM	**Registration Desk Opens**
9:00 AM	**Exhibit Hall Opens**
9:00 AM	**Hospitality Lounge Opens** **Sponsored by:** **Camelback Odyssey Travel**
10:15 AM	**Open Workshop**
11:00AM-11:45PM	**Open Workshop and Boxed Lunch**
12:00 PM	**Chairman Opening Remarks** **Presented by:**
12:10 PM	**Standalone**
12:30 PM	**Standalone**

12:50 PM	**Standalone**	
1:10 PM	**Standalone**	
1:30 PM	**Standalone**	
1:50 PM	**A Global Macroeconomic Outlook and Forecast: State of the Economy** Moderator: Panelists: **Frank Wisner, Financial Affairs Advisor, Squire Patton Boggs (US) LLP** **Richard Hokenson, Founder, Hokenson Demographics** **Sebnem Kalemli-Ozcan, Neil Moskowitz Professor of Economics, University of Maryland**	
2:40 PM	**Keynote Presentation** **Rebecca Patterson, Managing Director, Chief Investment Officer, Bessemer Trust (MFO)**	
3:05 PM	**Keynote Presentation** **Juan Zarate, Chairman and Co-Founder, Financial Integrity Network (FIN)**	
3:30 PM	**Networking Refreshment** **Break Sponsored by:**	
SPLIT TRACKS	***Track A - Brenton Hall***	***Track B - Rose Island Hall***
3:45 PM	**New World Family Office Structure Challenges: Managing Money for a Family Office in Today Compared to Institutions and Private investors** • Structure vs Practicality • Domestic vs Offshore wealth • Next generation involvement and transfer of wealth • Tax and Regulation considerations • Single Family office vs Multi-family office structures • Placement of family operating businesses. • Family Office Mechanics • Organizational Considerations	**Non-Correlated Alternative Fund Strategies** Moderator: Panelists: **TBA, Oasis**

<table>
<tr><td></td><td>Moderator:

Panelists:
Thomas Handler, J.D., P.C., Partner & Chairman of Advanced Planning and Family Office Practice Group, Handler Thayer, LLP</td><td></td></tr>
<tr><td>4:45 PM</td><td>Investing in Private Debt and Direct Lending (or Opportunities in Credit Investing)

Moderator:

Panelists:</td><td>Opportunistic Alternative and Niche Strategies - Diversification in a late market cycle environment
Defining today's niche strategies and how niche can become mainstream
Investing early to build relationships for successor funds
Finding scalable niche and emerging opportunities
Seed and acceleration economics
Underwriting newer firms, additional diligence steps: terms, team, track record, infrastructure
Moderator:

Panelists:</td></tr>
<tr><td>5:45 PM</td><td>Investing in Fixed Income: Investing in a Rising Rate Environment
How is the Federal Government playing a role in today's fixed income market?
Why look beyond "traditional" Fixed Income investments?
What are the key investable areas of fixed income for investors)?
What unique strategies are available in this market?
How should an investor choose a fixed income manager?
What frameworks are sophisticated investors incorporating into their decision-making?
Must investors give up returns when making investments that have a positive impact?
What are the challenges in finding good opportunities?
Moderator:

Panelists:</td><td>Co-Investments or Direct Investment Structures: A Move to the New Normal?

Moderator:

Panelists:</td></tr>
<tr><td>6:30PM-7:30PM</td><td colspan="2">Networking Cocktail Reception
Join us and unwind with fellow industry professionals for refreshments & hors d'oeuvres.</td></tr>
</table>

	Sponsored by:

TUESDAY, JULY 23, 2019

7:00AM-8:30AM	**Continental Breakfast**	
7:00AM-7:00PM	**Registration Desk & Exhibit Hall Open**	
7:00AM-6:30PM	**Hospitality Lounge Open** **Sponsored by:** **Camelback Odyssey Travel**	
GENERAL SESSION	***Brenton Hall - General Session Room***	
7:30AM-8:30AM	**Private Closed Session for Family Offices** **(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. You will walk away from this workshop with specific strategies to move your family toward greater harmony and vision in creating your own multigenerational legacy. ***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.*** **Managers and Service Providers *will not be allowed* in the session, no exceptions.** Facilitator:	
GENERAL SESSION	***Brenton Hall - General Session Room***	
8:30 AM	**Opening Remarks**	
SPLIT TRACKS	***Track A - Brenton Hall***	***Track B - Rose Island***
8:40 AM	**Real Estate Investing: Building, Balancing and Tweaking Your Portfolio for Long-Term**	**Extracting Alpha from Private Equity and**

	Driven Returns Moderator: Panelists:	**Venture Capital Opportunities and Deal Flow** Moderator: **Tim Rafalovich, Senior Vice President, Wells Fargo, Alternative Equity Investor** Panelists: **Steve Cowan, Managing Director, 57 Stars, LLC**
9:40 AM	**Investing through Qualified Opportunity Zones** Moderator: Panelists: **Jide Famuagun, CEO, Alpha Capital Partners**	**Investing in the Energy Markets** Moderator: Panelists: **Eric Kaufman, Managing Partner & Portfolio Manager, VE Capital Management, LLC**
10:40 AM	**Networking Refreshment** **Break Sponsored by:**	
GENERAL SESSION	*Brenton Hall - General Session Room*	
11:00 AM	**TBA, eVestment**	
11:20 AM	**Edward Coyne, Executive Vice President, Sprott Asset Management**	
11:40 AM	**TBA, CIM Group**	
12:00 PM	**Standalone**	
12:20 PM	**Jide Famuagun, CEO, Alpha Capital Partners**	
12:40 PM	**Keynote Presentation:** **John Felker, Director, National Cybersecurity and Communications Integration Center, Department of Homeland Security**	
1:10 PM	**Networking Luncheon** **Sponsored By:**	
GENERAL SESSION	*Brenton Hall - General Session Room*	

<table>
<tr><td>2:30 PM</td><td colspan="2">Tracking the Smart Money: Family Office CIO Roundtable:

Moderator:

Panelists:
Carol Pepper, CEO & Founder, Pepper International LLC (MFO)</td></tr>
<tr><td>SPLIT TRACKS</td><td>Track A - Brenton Hall</td><td>Track B - Rose Island Hall</td></tr>
<tr><td>3:30 PM</td><td>Investing in Blockchain - Distributed Ledger Technology (DLT) Markets

Moderator:

Panelists:</td><td>Philanthropy and Its Role in the Family Office

Moderator:
Richard Marker, Founder/Co-Principal, Wise Philanthropy; Faculty Co-Director, University of Pennsylvania Center for High Impact Philanthropy

Panelists:
Ellen Israelson, VP Philanthropic Services, Jewish Communal Fund
Caren Croland Yanis, Principal, Croland Consulting
Ronald Bruder, Founder, Education For Employment</td></tr>
<tr><td>4:30 PM</td><td>Investing in Innovative Technology: Investments that Change the Future

Moderator:
Nathan McDonald, Managing Director and CEO, Keiretsu Capital

Panelists:
TBA, Keiretsu Capital
TBA, Keiretsu Capital
TBA, Keiretsu Capital
TBA, Keiretsu Capital</td><td>Impact Investing - Accelerating the Momentum Toward The New Normal

Moderator:

Panelists:</td></tr>
<tr><td>5:30 PM</td><td>Investing in the Cannabis Industry

Moderator:

Panelists:
TBA, Duane Morris</td><td>Breaking Down ESG Strategies
The term “ESG investing” is tossed around in the media and in boardrooms, but what exactly is it? This panel will discuss ESG strategies from several perspectives.
Is there real money being put to work?
What types of investors are investing with an ESG lens?
How does an investor implement an ESG strategy? Does one give up returns?
Are investment tradeoffs to be considered?
The practical considerations when implementing such a strategy across asset</td></tr>
</table>

		classes. • How Trump Presidency Is Boosting Demand for Impact Investing, ESG Funds • What sort of practical challenges have experienced funds faced when implementing ESG into their business strategy, and is there anything they would have done differently? Moderator: Panelists: **Elena Savostianova, Managing Partner, Ember Infrastructure Partners**
6:15 PM - 9:15 PM	**Summer Social Networking Bash** **Join us and unwind with fellow industry professionals for Live Music, Great Food, & Refreshments during our networking party.** **(Registered guests only)** **(Shuttle Service begins at 6:00PM to Goat Island)** **Featuring Live Music** **Global Impact Award Presented to:** ***Thank you to our Sponsors!*** **Alpha Capital Partners**	

WEDNESDAY, JULY 24, 2014

7:00 AM	**Continental Breakfast** **Sponsored by:**
8:00 AM - 2:00 PM	**Registration & Exhibit Hall Open**
8:00 AM - 2:00 PM	**Hospitality Lounge Open** **Sponsored by:** **Camelback Odyssey Travel**
8:00 AM	**Opening Remarks**

8:00 AM	**The Importance of Proper Manager Selection in your Asset Allocation and Portfolio Construction Strategies** • Do you use the same approach for every asset class? • What Irregularities have we seen in Portfolios as Asset Classes are Redrawn and Renamed via Risk Allocation? Are we still too Over-Reliant on Equities? • Due diligence and attribution • Consideration of fees • How can considering Diversification and Risk Independently help Investors Build More Efficient Portfolios? • Prognosis for markets, near and longer-term. • Targeted asset allocation strategies moving forward • Active vs. Passive Management • Performance and Benchmarking • Present value of future liabilities at market interest rate rather than made up / assumed rate. How that affects measured funded level and consequent asset allocation decision • How to measure success • Consultants role in finding the right manager Moderator: Panelists:
8:45 AM	**Risk, Return and Impact: Understanding Diversification and Performance Within Your Portfolio** • How may we best assess risk and return in the context of investing? • Must investors assume a financial penalty for pursuing social and environmental impact through their investments? • Are new investing vehicles more risky than traditional investment options in the same or similar asset classes? • In an evolving and dynamic market, how should asset owners manage appropriate risk exposure in fulfillment of their fiduciary responsibilities? • How can we best measure the risk and impact of our investments? Moderator: Panelists:
9:45 AM	**Standalone**
10:05 AM	**Standalone**
10:25 AM	**Standalone**
10:45 AM	**Building Systems that Attract Investors** • Critical Steps to Create an Effective Investing Strategy • When do the big trends and solutions become additive and generate "alpha"? • Investors want to see that their investments are making a real difference. How do you achieve that? • What Will It Take to Get to Scale? • Dos and Don'ts for Social Entrepreneurs Seeking Funding

	• Theme-Specific Investments? • Hidden Risks and the Importance of Fund Level Due Diligence • Designing unique investment programs for institutional and high-net-worth clientele • Tax consequences of investment actions Moderator: Panelists:
11:30 AM	**Driving Millennials and the Z-Generation to take over. Engaging our future leaders.** Moderator: Panelists:
12:15 PM	**Family Governance and The Single Family Office: Planning for the Next Generation** • Why governance is important • Structures that are utilized to improve governance • Best Practices & Recommendations • Importance of collaboration by the family's multi-disciplinary advisory team • Common pitfalls • Are Family Constitutions Needed & Upholdable? • War stories and success stories (especially anecdotes focused on helping a dysfunctional family move forward) • Key takeaway - Soft issues will determine success or failure! Moderator: Panelists: **Thomas Handler, J.D., P.C., Partner & Chairman of Advanced Planning and Family Office Practice Group, Handler Thayer, LLP** **TBA, Marks Paneth LLP**
1:00 PM	**Private Closed Session for Family Offices** ***(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. **TOPIC** ***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.*** **Managers and Service Providers *will not be allowed* in the session, no exceptions.**

	Facilitator:
2:30 PM	**Closing Remarks**