Tuesday, October 24, 2017

4:00 PM - 5:00 PM	**Exhibit Set-Up**
4:00 PM	**Registration**
5:30 PM	**Keynote Speaker** **In conjunction with** **Family Office Networks** Dr. Adam Gazzaley, MD, PhD, *Founder & Executive Director*, Neuroscape; Professor, University of California, San Francisco
6:30 PM - 8:00 PM	**Official Welcome Reception in Exhibit Hall** **In conjunction with** **Family Office Networks and Keiretsu Capital** Join us to kick off this year's event with fellow industry professionals for refreshments and hors d'oeuvres. **Sponsored by:** **Abom** **Carmell Therapeutics** **Portland Development Group** **Phytonix** **Touchjet**

Wednesday, October 25, 2017

7:00 AM - 11:00 AM	**Exhibit Hall Open**
8:00 AM	**Registration**
8:00 AM	**Networking Continental Breakfast in Exhibit Hall** **Sponsored by:** **Wells Fargo Private Bank**

8:30 AM	**Chair Opening Remarks**
8:45 AM	**The Modern Day Family Office: How To Properly Structure & Select Resources That Fit Your Family's Needs** • What are the key considerations for families or individuals establishing a family office? • What are key planning mechanisms that a family office should consider before they set up a family office? • Why does a family need a strategy? How do you formulate one? What components and considerations must go into your planning process? • Setting your family wealth strategy. Setting your family business strategy. Planning for the investible: Estate Tax Considerations • During this panel, leading family office advisors will share best practices on the legal, financial, compliance, estate planning, tax, family governance, investments and wealth transfer considerations that need to be assessed when establishing a *de novo* family office Moderator: **Aviva Pinto, Director, Bronfman E.L. Rothschild (MFO)** Panelists: **Joseph Ehrlich, Executive Vice President, Owens Group** **Thomas Handler, Partner & Chairman of Advanced Planning and Family Office Practice Group, Handler Thayer, LLP** **Zoltan Szakal, President, Black River Technologies Inc.** **TBA, TriNet HR III, Inc.**
9:45 AM	**A Global Macroeconomic Outlook and Forecast: How to Plan Your Investments for the Next Generation** Moderator: **Doug Evans, Head of Investments, Abbot Downing (MFO)** Panelists: **Roger Barone, Director, CJA Investments, Ltd (SFO)** **Dan Shainberg, Chief Investment Officer, BHIC LLC (SFO)** **Jerry Olynuk, Sr. Vice President & Portfolio Manager, Northland Wealth Management (MFO)**
10:30 AM	**Keynote Speaker** **Robert L. Borden, Managing Partner and CIO, Delegate Advisors (MFO)**
11:00 AM	**Networking Refreshment Break in Exhibit Hall** **Sponsored by:** **Encore Energy, Inc.**
11:20 AM	**Horizontal Berea Oil Program Summary**

<table>
<tr><td></td><td colspan="2">Steve Stengell, President & CEO, Encore Energy, Inc.</td></tr>
<tr><td>11:40 AM</td><td colspan="2">Integrating Real Estate Into Your Overall Investment Portfolio Given Current Market Conditions.

Speakers:
Eric Hu, Vice President, WM Real Estate Advisory Specialist, Wells Fargo Private Bank
Ron Vyse, Senior Vice President, Wealth Advisor, Wells Fargo Private Bank</td></tr>
<tr><td>12:00 PM</td><td colspan="2">Presentation by:

Edgar Ríos-Mendez, Esq, Tax Partner, Pietrantoni Méndez & Alvarez LLC
Gabriel Hernandez, Partner, Tax Services, BDO Puerto Rico</td></tr>
<tr><td>12:20 PM</td><td colspan="2">TBA, Sixty West</td></tr>
<tr><td>12:50 PM</td><td colspan="2">Keynote Speaker

John Christianson, CEO, Highland Private Wealth Management (MFO)</td></tr>
<tr><td>1:10 PM</td><td colspan="2">Networking Luncheon</td></tr>
<tr><td>SPLIT TRACKS</td><td>Track A</td><td>Track B</td></tr>
<tr><td>2:30 PM</td><td>Opportunities in Fixed Income and Private Credit

Moderator:

Panelists:
Kort Schnabel, Partner, Ares Management LLC
Robert Gruewald, CEO, Flat Rock Global, LLC</td><td>Investing in Innovative Technology: Investment that Change the Future
Disruption -- Technical and Medical advancements how to find them -
Attracting Investments from the Family Office Community - How to find and build this relationship
How much interaction do you expect from your investor -- Describe some positive and negative experiences?
Connecting Family Office and Institutional investors to unprecedented access to early stage Technology and Medical investment opportunities - Pluses and Minuses for the family office
Returns—How does the Family Office best capitalize on these investments—Exit vs. IPO
Moderator:
Nathan McDonald, Managing Partner and CEO, Keiretsu Capital

Panelists:
Gordon Skene, Chairman, Phytonix Corporation</td></tr>
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		Don Megrath, CEO, Abom **Mike Hubbell, CEO,** Portland Development Group **Randy Hubbell, CEO,** Carmell Therapeutics **Helen Thomas, CEO,** Touchjet
3:30 PM	**Real Estate Investing: Opportunistic vs. Value Added vs. Core vs. Debt** • What type of assets are you considering to invest into right now? • What are your target returns? • How do you view the market going into this year compared to last year? • What markets are you looking to invest into? • Do you see any "waves" on the horizon and if so how do you plan on handling that? • What type of capital are you looking for right now? RePe / family offices / institutions/ all the above? • What are some of the challenges that you have faced over the last year and how have you handled that? Moderator: **DJ Van Keuren, Director - Family Office Capital,** Hayman Family Office (SFO) Panelists: **Dominic Sergi, CEO,** Clear Height **Mark Hanf, CEO,** Pacific Private Money, Inc. **TBA,** Joss Realty Partners **TBA,** Marketorder Financial	**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: **Stephen Braun, Senior Vice President,** J.I. Kislak Inc. (SFO) Panelists: **Boris Jordan, Managing Partner,** Measure 8 Venture Partners LP
4:30 PM	**Opportunities, Trends and Challenges for Investing in Real Estate in Private Equity** Moderator: **Ricky Novak, General Counsel; Real Estate & Tax Advisor,** The Strategic Group of Companies Panelists: **Brent Zimmerman, CEO,** ReSpring	**Investing in Emerging Managers: The beauty of investing in small.** Moderator: **John Daily, Vice-Chairman Investment Committee,** Culinary Institute of America Panelists:
5:15 PM	**Networking Cocktail Reception in Exhibit Hall** Join us and unwind with fellow industry professionals for refreshments during our last networking break of the day. **Sponsored by:** Pietrantoni Méndez & Alvarez LLC BDO Puerto Rico **Wine Sponsors:**	

Thursday, October 26, 2017

7:00 AM - 8:30 AM	**Networking Continental Breakfast in Exhibit Hall** **Sponsored by:**	
7:00 AM- 7:00 PM	**Registration & Exhibit Hall Open**	
7:00 AM - 8:00 AM	**Sunrise Yoga with** **Meaghan Kennedy Townsend, Member, Kennedy Family Office (SFO)**	
8:00 AM - 9:00 AM	**Private Closed Session for Family Offices** **(Family Offices ONLY)** **"Family Issue Processing"** 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: 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: **Amy Brodsky, Founding Partner, Sky Partners LLC**	
9:00 AM	**Opening Remarks**	
9:10 AM	**TBA, global X**	
SPLIT TRACKS	**Track A**	**Track B**

9:30 AM	**Permanent Capital - The New Old Strategy that Family Offices Need to Know More About** Moderator: **Brian Smiga, Partner,** **Alpha Venture Partners / Pritzker Group Venture Capital** Panelists: **William Lappas, Managing Director,** **Woodbridge Capital Partners, LLC (SFO)** **David Robb, Managing Director,** **Frontier Group (SFO**	**Managing 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. • Volatility Strategies In An Uncertain World • Monitoring, Reporting and Risk Management of Alternative Investments – What Is State of the Art? • Cyber security and it role in risk and your portfolio Moderator: **Todd Tweedy, Director,** **CTC | myCFO** Panelists: **Chad Naylor, CEO and CIO,** **Naylor & Company Investments, LLC** **TBA,** **Monashee Capital Partners**
10:15AM	**Quality Private Equity and Venture Investing for Family Offices** Moderator: **Nicole Taylor, Principal,** **Taylor Family Office, LLC (SFO)** Panelists: **Alireza Rahnema, Managing Partner,** **7 Gate Ventures** **TBA,** **JP Morgan Securities**	**Investing in the Real Asset & Energy Markets** • Finding opportunities inside and outside the developed markets • Facing the valuation challenges • Are these asset classes over valued? • Will they continue to retain their diversification credentials via lower correlation with more liquid asset classes? • Current Challenges in the Infrastructure Asset Class – Lessons Learned from Recent Practical Experience • Evaluation and Simulation of Renewable Energy Portfolios Moderator: **Michael Felman, President,** **MSF Capital Advisors (MFO)** Panelists: **Michael O'Kane, COO,** **New Zealand Bullion Depository LP**
11:00 AM	**Networking Refreshment Break** **Sponsored by:** **Altegris Investments**	
11:20 AM	**Non-Correlated Alternative Fund Strategies**	**Investing in SRI & ESG Strategies**

	• Is there a new look to alternative assets that are non-correlated or is the party over? • What are the assets that investors should consider? Moderator: **Abigail Laufer, CEO, Ferguson Family Office (SFO)** Panelists: **Aaron Fenn, COO, Broadway Strategic Return Fund**	Moderator: Panelists:
12:20 PM	**TBA, Altegris Investments**	
12:40 PM	**TBA, Cove Street Capital**	
1:00 PM	**Networking Luncheon**	
2:15 PM	**100 Things - What's on your list?** Affected by the loss of a close friend, Sebastian Terry started on a personal journey to find happiness. His story and list have not only gone onto change his life, but have accidentally started a global movement of people who all now chase their dreams and help others in acts of kindness. Guaranteed to make you laugh, cry and inspire motivation, the 100 Things keynote is like no other and will re-engage, connect and inspire you to consider this question - 'What's on your list? **Keynote Speaker** **Sebastian Terry, Author, "100 Things"**	
2:45 PM	**Family Office CIO Roundtable** Family Office CIOs and Pension Funds are determined to lower fees paid to GPs. Some of these methods include: increasing direct co-investment, seeding GPs (in exchange for lower fees), pressing for performance hurdles and lower fees. In addition, team-constrained CIOs need the expertise, diligence, relationship capital and deal flow from their GPs. Our panel of CIOs will explore how the LP/GP relationship will evolve over the next decade. Moderator: **Howard Cooper, CEO, Cooper Family Office (SFO)** Panelists: **Brandon Rath, Chief Investment Officer, Calamar (SFO)** **Carol Pepper, CEO and Founder, Pepper International LLC (MFO)** **Dan Martino, Chief Investment Officer, OCEANM19 (SFO)**	
3:45 PM	**Impact Investing: Driving Social Purpose Through Measurable Investment Returns** Moderator: **Tami Kesselman, Founder & CEO, TBL Alpha Advisory**	

	Panelists: **Jennifer Kong, Philanthropic Advisor,** **Rockefeller Philanthropic Advisors** **Katie Kalvoda, Founder & CEO,** **Calvados Investments LLC (SFO)** **Meaghan Kennedy Townsend, Member,** **Kennedy Family Office (SFO)** **Ken St. Amand, VP, Client Portfolio Manager,** **Mirova**
4:45 PM	**The Hedge Fund Industry: A transitional time for the industry?** • Hedge Fund Indexation and Replication • How Is the Tide Turning for Hedge Fund Strategies? • Human vs. Machine - Could Data Science & Artificial Intelligence Disrupt the Entire Hedge Fund Industry? • Insights into the opportunity set in 2018 • Merger arbitrage strategies • Value-add of a multi-manager platform **(wine will be served courtesy of the Coomber Family)** Moderator: **Skip Coomber, III, President,** **Coomber Family Estates (SFO) / Dragon Trust Family Office (SFO)** Panelists: **Keith Seibert, Managing Director, Hedge Funds and Public Markets,** **CM Capital Advisors (SFO)** **Nicolas Amato, Managing Director,** **Wilshire Associates** **Scott Glickman, CFA, CAIA, Marketing & Investor Relations,** **FQS Capital Partners L.P**
5:45 PM - 6:45 PM	**Networking Cocktail Reception in Exhibit Hall** Join us and unwind with fellow industry professionals for refreshments during our last networking break of the day. **Sponsored by:** **global X** **Wine Sponsor:**

Friday, October 27, 2017

8:00 AM	**Continental Breakfast** **Sponsored by:**
7:00 AM - 8:00 AM	**Sunrise Yoga with** **Meaghan Kennedy Townsend, Member,** **Kennedy Family Office (SFO)**
8:00 AM - 9:00 AM	**Private Closed Session for Family Offices** **(Family Offices ONLY)** **Who is your "Wendy Rhoades"?** As a High Profile Family Leader/CEO/Executive it can be lonely at the top. Who do you have as a professionally experienced, impartial and trusted advisor that you and your family can rely on to help with your most pressing family challenges, business issues and opportunities?

	Please join us during this interactive, and thought provoking interview session to learn how having your own Performance Coach/"Wendy Rhoades" can create immeasurable financial and personal returns. 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: 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: **Amy Brodsky, Founding Partner,** Sky Partners LLC **Stacey Alcorn, CEO,** Laer Realty Partners
9:00 AM	**Welcome Remarks**
9:15 AM	**Engaging the Next Gen to be Stewards of the Family Legacy** Moderator: **Rhona E. Vogel, CEO & Founder,** Vogel Consulting (MFO) Panelists: **Jennifer Kenning, CEO & Co-Founder,** Align Impact **Paul Krsek, Managing Member,** 5TQ Capital, LLC (MFO) **Jacqueline Holmes, Founder & Chief Investment Officer,** Midori Management (SFO) **David Campbell, Founder & Chairman,** All Hands Volunteer
10:00 AM	**Managing Behavioral Risk in Families of Wealth** Speaker: **Michael Pompian, Founder and CIO,** Sunpointe Investments (MFO)
10:30 AM	**How to Access the Best Managers via GP-CoInvestments or Direct Investment Structures** Moderator: **Brandon Laughren, Chief Investment Officer,** The Laughren Group (SFO) Panelists: **Paul Kang, President/CIO, Member of the Investment Committee,** AltaCap (SFO) **Robert Lee, Managing Partner & Principal,** SIG Equity Partners, LLC / Harlow Family Office (SFO)

11:15 AM	**When & Why Should You Use Consultants and Advisors in Your Family Office** Moderator: **Linda Mack, President and Founder, Mack International, LLC** Panelists: **Carolyn Weiss, Chief Financial Officer and Treasurer, The New York Community Trust** **Ron Diamond, CEO, Diamond Wealth Strategies** **David Novitsky, CFA, Director, Investment Advisory Services, CTC | myCFO**
12:00 PM	**Governance and Trusts: 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: **Biff Pusey, Senior Wealth Advisor & Portfolio Manager, Keel Point (MFO)** Panelists: **Susan Schoenfeld, CEO and Founder, Wealth Legacy Advisors LLC** **Chris Walters, Managing Director - Western Region, GenSpring Family Offices (MFO)** **Paul Vogel, CEO and Founder, Argos Family Office, LLC (MFO)**
1:00 PM	**Napa Valley Wine Tour and Luncheon Networking Event at** **Sponsored by:**