Tuesday, June 26

10.30-11.00	**Registration**

11.00-11.45 **The Future of the Family Office Industry**

- How has the industry morphed in the last few years?
- How has recent Dodd-Frank regulation changed the course for family offices?
- Transformation of single-family offices into multi-family offices and teaming up to share/outsource resources

Moderator: Kristi Kuechler, Lattice Strategies
Tom Handler, Handler Thayer
Jamie McLaughlin, J.H.McLaughlin & Co.
David Guin, Withers Bergman
Allan Zachariah, Pathstone Family Office

11.45-12.30 **New Wealth: Setting up a Family Office**

- Hedge Funds who set up family offices for personal wealth
- The niche of celebrity and athlete family office
- Entrepreneurs (Silicon Valley/Tech gurus) launching FOs

Charlie Grace, Family Office Exchange
Natasha Pearl, Aston Pearl
Carol Pepper, Pepper International

12.30-13.30 **Investing in Real Assets/Private Investments**

- Influx of interest from families about investing in real assets like oil, art, agriculture, etc.
- Why are families acutely interested in these types of investments? How do they access them?

Jesse Turley, US Trust
Jeff Blomberg, Withers Bergman
David Beach, BCM Energy

13.30-14.30	**Lunch and check in**

14.30-15.15 **Engaging the NextGen via Family Philanthropy**

- What are some ways to engage the next generation of wealth holders?
- How can philanthropy play an integral role?
- What's an example of a family office engaging in philanthropy- (IE: Ken Kilroy from Trailhead Advisors)

Darcy Bhatia, Channel Family Assets
Maryann Fernandez, Philanthropy Indaba

15.15-16.00 **The 'Alternative' Alternatives**

- Exploring alternative investments such as art, wine and collectibles
- How can you work with families on passion investing?
- What are some of the overarching trends in each niche investment area?

Moderator: Natasha Pearl, Aston Pearl
Warren Winegar, Winegar Fine Art
Tim Clew, The Wine Trust

16.00 **Wine tasting followed by free time/informal meetings**

19.30 **Drinks reception followed by dinner**

Wednesday, June 27

08.30-09.15	**Breakfast and check out**

09:15-9:30 **Recap**

09:30-10:15 **Succession Planning for the Family Business**

- Family businesses: multi-generational vs. entrepreneurial
- How do you create a solid succession plan?
- How do existing family dynamics factor into the process?

Lisa Gray, Gray Matters Strategies
Hannah Grove Shaw, HS Grove Private Wealth Specialist

10.15-11.00 **Hedge Fund Investing for the Family Office**

- What types of hedge funds are family offices currently interested in?
- How do family offices gain access to hedge funds? What strategies are they interested in?
- How do SFOs and MFOs differ in prospecting hedge funds and how does their due diligence process differ?

Moderator: Charlie Grace, Family Office Exchange
Mitch Eichen, The MDE Group
Richard Heller, Thompson Hine
Kristi Kuechler, Lattice Strategies
Max Osborne, Permal

11:00-11:30	**Refreshment break**

11.30-12.15 **Social Media for the High-net-worth Family**

- How can wealth advisors and family offices best utilize social media?
- What are the basics and how do they get across their marketing message?
- Leading security trends for in the family office space

Linda Mack, Mack International
April Rudin, The Rudin Group

12.15-13.00 **Tackling Taxes: Efficient estate and tax strategies for the ultra-wealthy**

- What is the current update on the estate tax and how can it affect families?
- What are some efficient estate planning strategies to help the non-traditional family IE- the LGBT community
- What will 2013 hold for the estate tax?

Michael Markiewicz, Fogel Neale
Adam Sansiveri, Bernstein Global Wealth Management

13.00-13.15 **Final words**

13.15	**Farewell lunch**