



# private wealth management summit



a **marcusevans** event

## Delegate Information

December 1-3, 2010 | Red Rock Casino • Resort • Spa | Las Vegas, NV

# progress

Ralph Waldo Emerson

is the activity of today and the  
**assurance** of tomorrow

High net worth individuals are faced with an array of complexities surrounding the numerous disciplines that make up their families' financial life. Family office executives must be able to provide innovative and comprehensive financial strategies to preserve and strengthen their families' wealth and ensure all family goals are met.

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## A Unique Event

Loss of trust has been a major theme in the financial world and has led to heightened risk management amongst the financial community. High net worth individuals are seeking guidance and sound private wealth management advice to grow and preserve their wealth moving forward. It is up to family office executives to develop a process of accountability with the intent of re-establishing and strengthening client relationships.

As investment strategies, tax policies and legal structures have become increasingly more complex, an experienced and knowledgeable team able to adhere to these new demands is imperative to preserve and strengthen their client's wealth. Family wealth executives must be able to engage their families with breakthrough conversations that will lead to profitable investment and tax efficient strategies that they understand, as well as, innovative planning strategies to meet overall family goals.

The **Private Wealth Management Summit** will highlight the current challenges and opportunities through visionary conference sessions and keynote presentations delivered by your most esteemed peers and thought leaders from America's leading single and multi-family offices. The one-on-one meetings with leading service providers will offer vast expertise in the area of investment and asset allocation strategies. All this, seamlessly integrated with informal networking opportunities over three days, will provide a unique interactive forum. Do not miss this opportunity to network, establish new connections, exchange ideas and gain knowledge.

## The Summit Program Key Topics

The primary objective of the **Private Wealth Management Summit** is to explore the key aspects and issues related to family offices as business drivers for innovation and growth. The Summit's program topics have been pinpointed and validated by the private wealth industry as the top critical issues they face. Key issues for 2010 include:

**Changes and New Dynamics in Federal Tax Policy** – Providing insight into the dynamics on Capitol Hill affecting the prospects of tax reform

**New Risk Model for Portfolio Management** – Innovative strategies to evaluate and manage risk in the current uncertain investment environment

**Educating the Next Generation in Wealth Management** – Understanding the mindset of millennial inheritors

**Impact Investing** – Earning premium returns while making a difference

**Inflation vs Deflation Debate** – Identifying which is the greater threat

**Growth and Succession Strategies for SFOs/MFOs** – Developing strategies for succession of management and/or ownership

**Alternative Investments** – Strategies (Long/Short Hedge Funds) in a diversified portfolio

**Educating the Next Generation in Wealth Management** – Understanding the mindset of millennial inheritors

**Spotlight on Due Diligence** – Examining key components to a solid process

## Distinguished Presenters

**Chairman: Todd Benjamin**, Former Financial Editor, **CNN**

**Wolfgang Seidel, PhD**, Finance Professor, **ESCP Europe**

**Jim Brennan**, President, **GenSpring Family Offices**

**Christopher R. Pavese CFA**, Chief Investment Officer, **Broyhill Family Office**

**Jeff Tumolo**, Chief Investment Strategist, **TAG Associates, LLC**

**Tim Kochis**, Chairman and Principal, **Aspiriant, LLC**

**John Waldron**, Chief Executive Officer and Founder, **Waldron Wealth Management**

**John Longo**, Senior Vice President and Chairman of the Investment Committee, **The MDE Group**

**Nicholas Rotello**, Managing Director, **Seven Two Partners, LLC**

**Jim Foster**, Managing Director, **Greycourt & Co., Inc.**

**Ted Cronin**, President and Chief Investment Officer, **Manchester Capital Management**

**Carol Pepper**, Founder and Chief Executive Officer, **Pepper International**

**Cary Klivan**, Chief Operating Officer, **BBR Partners**

**Ron Albahary**, Chief Investment Officer, **Convergent Wealth Advisors**

**Brad Fisher**, Chief Executive Officer, **Springcreek Advisors, LLC**

**Jeff Cook**, President and Chief Executive Officer, **Policy and Taxation Group**

**Leslie Giordani**, Partner, **Giordani, Swanger, Ripp & Phillips, LLP**

**Bob Chesner**, Director, **Giordani, Swanger, Ripp & Phillips, LLP**

**Jeffrey R. Matsen**, Founding and Managing Partner, **Wealth Strategies Counsel; Bohm, Matsen, Kegel and Aguilera, LLP**

**Lee D. Unterman**, Managing Partner, **Kurzman Karelsen & Frank, LLP**

**Chet Billingskey**, Managing Partner, **Cancer Index Fund**

**Terence S. Greene**, Partner and Chief Investment Officer, **Capital Counsel LLC**

**Samantha C. Smith**, Partner and Director of Client Service and Marketing, **Capital Counsel LLC**

**Rod Cain Jones**, Managing Partner, **Cain Capital, LLC**



## Summit Program

### Keynote Presentation

#### **The Macroeconomic Environment and its Implications on Asset Returns/Asset Allocation**

**Wolfgang Seidel, PhD**, Finance Professor, **ESCP Europe**

The current macroeconomic situation is highly uncertain and the expectation pendulum is swinging between contradicting extremes such as sustained recovery vs double dip and the inflation vs deflation. Dr Wolfgang Seidel addresses the critical aspects of the main issues, provides background data and develops scenarios. The aim is to derive an asset allocation that reflects the current risk and opportunities. More specifically this keynote presentation will underline the following:

- Predicting the path the economic development will likely pursue
- Identifying implications on the capital markets in terms of asset pricing and performance
- Determining which asset classes and sectors are to be underweighted or overweighted

### Presentation

#### **Return Expectations – Expect the Unexpected?**

**Nicholas Rotello**, Managing Director, **Seven Two Partners, LLC**

Investors' future return expectations are often based on historic performance. Together we will explore why the conditions that drove past performance will not exist in the immediate future. We will discuss and define several major asset classes, and talk about the dichotomy between historic performance and future expectations. We will also define what investors should actually expect, why, the obstacles they face, and how they can reach their objectives.

- Define current asset allocation and return expectations
- Past returns and drivers by asset class: Create a range of expected portfolio returns
- Future return drivers by asset class: Create a new range of expected portfolio returns
- Conclusion: Modify asset allocation, focus on specific non-traditional return drivers (and risk factors), monitor fees and spending, and wait for opportunities

### Presentation

#### **Educating the Next Generation in Wealth Management**

**Carol Pepper**, Founder and Chief Executive Officer, **Pepper International**

- Understanding the mindset of millennial inheritors
- Using technology to capture attention and to communicate effectively
- Creating sophisticated investors who can take the reins of family fortunes

### Presentation

#### **Growing a Wealth Management Practice**

**John Waldron**, Chief Executive Officer and Founder, **Waldron Wealth Management**

- Value added services to the client engagement
- Finding, compensating and motivating competent professionals
- Approach to business development

### Presentation

#### **Asset Allocation and Portfolio Construction in a Bipolar World**

**Ron Albahary**, Chief Investment Officer, **Convergent Wealth Advisors**

Is this country headed for Japanese-style deflation because of broken monetary mechanisms or is it on a path to high inflation due to unprecedented levels of monetary and fiscal stimulus? How important is knowing the answer to this question when formulating investment policy? Deciding which theory will prevail makes portfolio management challenging. In this session, get an advisor's perspective on devising strategies to deal with economic uncertainties and divergent client views by reviewing:

- Historical perspectives on inflation and deflation and the current case for both
- Areas of investment opportunity in an era of sluggish growth in developed countries
- Strategies to build, monitor and manage portfolios
- How to frame client discussions and shape expectations

### Presentation

#### **Changes and New Dynamics in Federal Tax Policy**

**Jeff Cook**, President and Chief Executive Officer, **Policy and Taxation Group**

With many of the 2001 tax cuts expected to expire at the end of 2010, now more than ever family offices need to be prepared for significant changes out of Washington. High net worth individuals and families will soon experience increased taxes on payroll, income, capital gains and dividends and limits on deductibility. At the same time, the future of the estate tax is unclear, with changes to the rate, exemption, valuation, planning techniques and family foundations in play. This session will focus on:

- Providing insight into the dynamics on Capitol Hill affecting the prospects of tax reform
- Assessing the changes expected to estate and other tax policy in 2011
- Examining the potential impact of the election on the development of tax policy in the next Congress



Presentation

**Inflation vs Deflation Debate: Identifying Which is the Greater Threat**

**Christopher R. Pavese, CFA**, Chief Investment Officer, **Broyhill Family Office**

Much debate has arisen over whether investors should prepare for the potential risks of inflation or deflation. Many seem divided on which one should be expected in the coming months; Chris Pavese will provide his views on this issue along with:

- Determining whether to align your portfolio to withstand inflationary or deflationary periods
- Deciding how to adjust your portfolio in the short term and long term
- Pinpointing the types of investments that do well in an inflationary period and those that do well in a deflationary period

Presentation

**New Risk Model for Portfolio Management**

**John Longo**, Senior Vice President and Chairman of the Investment Committee, **The MDE Group**

- Risk as the central focus in client discussion
- Innovative strategies to evaluate and manage risk in the current uncertain investment environment
- Integration of strategies into a comprehensive solution for HNW individuals

Panel Discussion

**Spotlight on Due Diligence: Examining Key Components to a Solid Process**

**Jim Foster**, Managing Director, **Greycourt & Co., Inc.**

**Cary Klivan**, Chief Operating Officer, **BBR Partners**

**Jeff Tumolo**, Chief Investment Strategist, **TAG Associates, LLC**

The emergence of scandals in a regulated environment has heightened the awareness and importance of having solid due diligence procedures implemented. Family offices are further recognizing that thorough processes are imperative for safeguarding the wealth of their clients and upholding the integrity and reputation of their offices. This session will answer the following questions:

- What really constitutes proper due diligence?
- What are the absolute best practices when conducting due diligence?
- How to build the most effective due diligence checklist to prevent fraud

Presentation

**Investment Strategies for Hedge Funds**

**Jeff Tumolo**, Chief Investment Strategist, **TAG Associates, LLC**

- Examining market timing and absolute return strategies
- Evaluating opportunities
- Risk assessment of hedge fund strategies and performance

Presentation

**Family Governance and Investment Policy Coordination for Multi-Generational Families**

**Ted Cronin**, President and Chief Investment Officer, **Manchester Capital Management**

Examining the governance role and investment policy issues facing families as they strive to maximize investment income, minimize tax impacts, address risk matters, and steward wealth from generation to generation.

- Family legacy – preserving business interests; bundled or unbundled participation
- Family goals – per capita, purchasing power for future generations
- Decision making – enacting a process for each constituency
- Family leadership – succession and educating next generation
- Communication – sharing access and information while maintaining efficient decision making

Presentation

**Impact Investing – Earn Premium Returns While Making a Difference**

**Brad Fisher**, Chief Executive Officer, **Springcreek Advisors, LLC**  
The term 'Impact Investing' refers to one of the greatest investment themes of our generation: the transition from 'The Carbon Economy' to The 'Conservation Economy.' Trillions of dollars will flow to the people who drive this change. How can families participate in this massive investment theme? In this interactive session, you will learn about the basics of Impact Investing, and you will come away with the ability to begin constructing your own impact investment portfolios.

- The evolution of impact investing from compromised SRI to a premium return investment theme
- The nature of the transition from the carbon economy to the conservation economy, including case examples and historical precedence
- Key elements of the investment theme that results from this transition
- The process of creating and managing investment portfolios that address this opportunity
- Specific strategies, managers, and resources that exist across each asset class

Presentation

**Growth and Succession Strategies for SFOs/MFOs**

**Tim Kochis**, Chairman and Principal, **Aspiriant, LLC**

Growth is a subtle imperative for any family office firm that wants to excel in its services and survive beyond the initial foundations. Some costs are irreducible and scale brings lower per asset operating expense, greater access to products and investment opportunities at lower costs, and perhaps most important, greater professional opportunity for key staff. This session will focus on:

- Developing strategies for succession of management and/or ownership... perhaps both
- Balancing the psychic rewards of control with the long term benefits of financial performance and organizational durability
- The limitations of purely "organic" growth
- Merger or acquisition ("inorganic") growth strategies as a replacement or supplement to the organic



## Masterclass

### **What Every High Net Worth Individual and Advisor Should Know about Asset Protection Planning**

**Jeffrey R. Matsen**, Founding and Managing Partner, **Wealth Strategies Counsel, Bohm, Matsen, Kegel and Aguilera, LLP**

Over the last few decades expanding theories of liability and proliferation of litigation has given increased emphasis to asset protection planning. We live in a victim oriented society with the "deep pocket" theory being aggressively asserted by plaintiff lawyers. Accordingly, now more than ever, family offices and high net worth individuals and their advisors need to plan for strategies and techniques to insulate and protect their assets from attack. Asset protection planning is an important part of estate planning and simply cannot be overlooked. This presentation will provide valuable planning and strategy insight in the following areas:

- Who are the potential predators waiting to attack high net worth individuals?
- What are the strategies available to protect your assets?
- How to decide whether to concentrate on a Domestic AP strategy or go offshore?
- Case studies will be utilized to more effectively demonstrate the planning and strategy involved

## Masterclass

### **Reducing Tax on Investment Portfolio Returns: A Top Priority in a Rising Tax Environment**

**Leslie Giordani**, Partner, Giordani, **Swanger, Ripp & Phillips, LLP**  
**Bob Chesner**, Director, Giordani, **Swanger, Ripp & Phillips, LLP**

Successful family offices and high net worth individuals recognize that reducing tax on investment portfolio returns is a top priority in a rising tax environment; however this goal should not be considered in isolation. By employing a top-down approach, matters involving investments, income taxation, estate taxation, asset protection, privacy and philanthropy can be addressed in unison to achieve optimal results. An important technique that helps achieve all of these goals is the strategic use of private placement life insurance within the investment portfolio. This session will examine:

- The multiple tax benefits available through the use of private placement life insurance
- The mechanics of a private placement life insurance investment program
- Demystifying the often misunderstood concept of investor control
- How to use private placement life insurance in the context of estate planning, asset protection and philanthropy

## Masterclass

### **Due Diligence and Compliance: A Primer in Coping with the Changing Regulatory Environment**

**Lee D. Unterman**, Managing Partner, **Kurzman Karelson & Frank, LLP**

Recently enacted and proposed regulatory changes will require all players in the financial services industry to re-think "old-school" approaches to compliance and due diligence. Apart from heightened regulatory scrutiny of registered investment advisors, the regulatory "anonymity" of hedge funds, private wealth managers, private equity funds and single and multiple family offices are now, to varying degrees, under question. Pending legislation may extend the government's reach into the confidential records of private fund investors and place the actions of private fund managers under regulatory scrutiny similar to that historically accorded to registered investment advisers. This timely session will offer a practical primer in what you can expect to see in the changing regulatory landscape, how these changes may affect private wealth managers and their clients and the steps you should take in anticipation of these inevitable changes to protect yourself and your clients and avoid potential pitfalls.

## Masterclass

### **Focus on capital preservation**

**Terence S. Greene**, Partner and Chief Investment Officer, **Capital Counsel LLC**

**Samantha C. Smith**, Partner and Director of Client Service and Marketing, **Capital Counsel LLC**

Fundamental analysis can tell you what a company is worth and reduces risk if you buy at that valuation. A patient adherence to a rigorous valuation buy/sell discipline can provide clients with good long-term results and protection in declining markets.

- Maintaining a disciplined approach to investment selection
- Managing concentrated portfolios which allows each investment to have a meaningful impact on performance
- Evaluating market correlation
- Commitment to transparency and industry best practices

## Case Study

### **High Risk-Adjusted Yields from Investments in Lesser Known US Government Guaranteed Securities**

**Rod Cain Jones**, Managing Partner, **Cain Capital, LLC**

Family offices always seek out investment opportunities offering unique and favorable risk/reward characteristics. The events of the past few years have combined to challenge virtually every known investment strategy. This case study will present the performance of a private limited partnership that produced high risk-adjusted yields by employing leverage to invest in lesser known US Government securities during the most challenging investment environment since the Great Depression. This session will focus on how the Fund employs leverage to invest in securities:

- The outstanding principal of which is backed by the full faith and credit of the US Government
- Bear coupons that are predominately variable, without caps/floors





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## The Executive Delegation

The **Private Wealth Management Summit** delegates will include Chief Investment Officers, Presidents, Managing Directors of Multi and Single Family Offices and are carefully screened and selected according to the following criteria:

- Scope of Responsibility
- Assets Under Management
- Sign-off Authority
- Institution/Company
- Interest in Purchasing Products and Services

## Private Wealth Management Summit Service Provider Companies

To ensure the success of the **Private Wealth Management Summit**, **marcusevans** is pleased to partner with an exclusive number of leading companies that can provide valuable fund management expertise. The service providers participating in the summit will provide strategic investment plans to ensure maximum capital growth to the attending family offices.

The number of companies in each product or service category is strictly limited to ensure an appropriate overall balance. These meetings provide a forum for dialogue and information sharing, on investment concerns and appropriate, corresponding services.

## Private Wealth Management Summit Service Provider Categories

### Advisory Services

- Compliance Services
- Fiduciary Services
- Investment Consultants
- Legal Services
- Philanthropic Services
- Trusteeship

### Asset Management

- Commodities/Managed Futures
- Distressed
- Emerging Managers
- Emerging Markets
- Energy
- Equity Products
- Exchange Traded Funds
- Fixed Income Products
- Funds of Funds
- Hedge Funds
- Infrastructure
- Master Limited Partnerships (MLPs)
- Mutual Funds
- Natural Resources
- Private Equity
- Real Assets
- Real Estate

- SMAs
- Socially Responsible Investing (SRI)
- Structured Products
- Venture Capital

### Brokerage Services

### Insurance Products

### Integrated Planning

- Estate & Financial Planning
- Intergenerational Wealth Transfer
- Tax Planning & Consultancy

### Lifestyle Planning

- Cash Flow Management
- Healthcare Services
- Private Travel
- Property Management

### Recruitment & Staffing Services

### Software & Technology Solutions

- CRM
- Information Lifecycle Management
- Portfolio Accounting Reporting
- Storage and Data Management
- Systems Integration
- Technology Consulting
- Risk Management Solution & Services

## Sample Delegate Schedule

Each attendee at the **Private Wealth Management Summit** receives a personalized itinerary based on their priority selections of conference sessions, business meetings and special networking events. Below is a sample of a personalized attendee schedule.

### DAY 1

- 11:00 – 01:00 pm Event Registration
- 01:00 – 01:15 pm Chairperson Opening Remarks
- 01:15 – 02:00 pm Opening Keynote Presentation
- 02:00 – 02:45 pm Conference Presentation
- 02:45 – 03:00 pm Networking Break
- 03:00 – 05:00 pm Business Meetings
- 05:00 – 05:45 pm Round Table Discussion
- 05:45 – 06:30 pm Conference Presentation
- 06:30 – 07:00 pm Keynote Presentation
- 07:00 – 07:30 pm Free Time
- 07:30 – 08:00 pm Welcome Cocktails
- 08:00 – 10:00 pm Networking Dinner

### DAY 2

- 07:00 – 08:00 am Networking Breakfast
- 08:00 – 08:45 am Keynote Presentation
- 08:45 – 09:30 am Conference Presentation
- 09:30 – 09:45 am Networking Break
- 09:45 – 11:45 am Business Meetings
- 11:45 – 12:30 pm Conference Presentation
- 12:30 – 01:45 pm Networking Lunch
- 01:45 – 02:30 pm Conference Panel Discussion
- 02:30 – 03:15 pm Conference Presentation
- 03:15 – 03:30 pm Networking Break
- 03:30 – 04:30 pm Business Meetings
- 04:30 – 05:00 pm Networking Opportunity
- 05:00 – 05:30 pm Business Meeting
- 05:30 – 06:15 pm Keynote Presentation
- 06:15 – 07:15 pm Free Time
- 07:15 – 10:30 pm Networking Cocktails, Dinner Entertainment Evening

### DAY 3

- 07:00 – 08:00 am Networking Breakfast
- 08:00 – 08:45 am Keynote Presentation
- 08:45 – 09:30 am Conference Presentation
- 09:30 – 09:45 am Networking Break
- 09:45 – 11:15 am Business Meetings
- 11:15 – 12:00 pm Conference Presentation
- 12:00 – 12:45 pm Closing Keynote Presentation
- 12:45 – 02:00 pm Networking Luncheon



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## What Makes the Private Wealth Management Summit Different

- A strictly invitation-only event; selection of delegates according to criteria such as scope of responsibility and size of company
- Restricted number of delegates in order to facilitate successful networking opportunities
- Personalized summit and meeting schedule to suit individual requirements and provide an efficient use of time
- Keynote presentations, case studies and interactive sessions by world-class industry experts and pioneers
- A relaxed but professional business environment, in which to explore new ideas, strategies and technical developments with industry colleagues, experts and peers
- Access to the secured summit website, providing information on other delegates and each service provider prior to the event
- Individual pre-arranged one-on-one business meetings with senior representatives from key industry service providers
- An opportunity to relax and enjoy the superb facilities at the prestigious Red Rock Casino Resort and Spa

## Secured Summit Website

- Summit session overviews allow delegates to choose from a selection of summit and interactive sessions to best suit their business needs
- Presenter biographies determine which presenters are most likely to assist in benchmarking and improving initiatives
- Profiles of attending service providers, offer relevant information to enable delegates to plan their personal event schedule
- Inform delegates of social activities taking place at the event
- Post-event summit documentation provides complete documentation of all executive presentations immediately after the Summit

## CPE Accreditation



**marcusevans** is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.

Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219 2417. Website: [www.nasba.org](http://www.nasba.org)

## The Venue

Red Rock's serene surroundings, distinctive décor, and impeccable standard of service ensure that your visit is flawless and fabulous. The Red Rock Resort exemplifies the essence of hospitality with a dedication to uncompromised service, seamless experiences and the utmost in guest gratification

The Conference Center facilities were designed by hospitality professionals who anticipate a group's every need to make their next experience at an event an effortless experience. Many spaces include large verandas with balconies overlooking the Red Rock Canyon and pool backyard.

[www.redrocklasvegas.com](http://www.redrocklasvegas.com)

## The Organizers

One of the world's leading business information companies, **marcusevans** is dedicated to the provision of global business intelligence and information to assist in strategic and effective decision-making. Our aim is to provide first class business information, through a variety of media, which enables clients to sustain a valuable competitive advantage while making a positive contribution to their success.

Established in 1983, **marcusevans'** international network of offices produces events on strategic issues in telecommunications, corporate finance, capital markets, human resources, corporate IT, technology, marketing, manufacturing, logistics, energy, utilities and business strategy. This information is disseminated through the following business divisions: summits, conferences, business training, market analysis and corporate hospitality.

Every year **marcusevans** produces more than 150 of the world's leading business and economic summits for senior decision-makers. Held at exclusive locations around the world, these events provide attendees with a unique opportunity to individually tailor their schedules of keynote presentations, think tanks, seminars and one-on-one business meetings to provide an effective, highly focused interactive event.

...a **dominant force** in the delivery of  
**strategic business information**



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## A Selection of Attendees from Previous **marcus evans** Private Wealth Management Summits

President & Chief Investment Officer  
**Adagio Trust Company**

Managing Director  
**Apogee Family Office, LLC**

Chief Investment Officer  
**Aspiriant**

Executive Vice President  
**Atlas Brown**

Portfolio Manager  
**Beck Mack & Oliver, LLC**

Chief Investment Officer  
**BluePointe Capital Management**

Senior Managing Director  
**Calibre Investment Consulting**

Director, Investment Consulting  
**Calibre Investment Consulting**

Managing Director  
**Chess Financial**

Senior Investment Analyst  
**Clearbrook Partners**

Manager, Family Office Services  
**Clearbrook Partners**

Principal  
**Coldstream Capital Management**

Managing Director  
**Convergent Wealth Advisors**

Regional Director  
**Convergent Wealth Advisors**

Chief Executive Officer  
**Cooper Family Office**

Chief Client Relationship Officer  
**Cornerstone Advisors, Inc**

Partner & Chief Investment Officer  
**Durbin Bennett Peterson Private Wealth Management**

Partner  
**Financial Management Partners**

Senior Vice President, Wealth Advisor  
**Frost Wealth Management Services**

Chief Investment Officer  
**Frost Wealth Management Services**

Chairman & Chief Compliance Officer  
**GCC Family Wealth**

Managing Director, Portfolio Strategies  
**Hale and Dorr Wealth Advisors**

Principal  
**Homrich & Berg, Inc**

Director of Investments  
**HRH Prince Pavlos Family Office**

Chief Executive Officer  
**J & T Roush Family, LLC**

President and Operating Officer  
**Kerr Financial Corporation**

Chief Investment Officer  
**Legacy Trust Company**

Managing Director  
**Lexington Wealth Management**

Chief Investment Officer  
**Long-Term Solutions, LLC**

Managing Director  
**Long-Term Solutions, LLC**

Chief Operating Officer  
**Manchester Capital Management, LLC**

Chief Investment Officer  
**McKinley Carter Wealth Services**

President & Chief Executive Officer  
**North American Management**

Managing Director  
**Prairie Capital Management**

Director, Investments  
**Quintessence Group**

Chief Investment Officer  
**RINET Company, LLC**

Chief Executive Officer  
**S4 Capital, LLC**

Vice President  
**St. Louis Trust Company**

Principal  
**The CAPROCK Group**

Managing Director  
**Tolleson Wealth Management**

Senior Wealth Counselor  
**Waldron Wealth Management**

Director of Investment Research  
**Waterline Partners**

Vice President & Director of Advisory Services  
**Whittier Trust Company**

## Testimonials

The event brought together a stellar collection of investors and investment ideas.

Managing Director  
**Ingleside Investors LLC**

Event is always great. Well worth the time.

Managing Director  
**Pathstone Family Office**

I found the event to be informative, thought provoking and well attended by high quality firms and product providers.

Managing Director  
**Constellation Wealth Advisors LLC**

The event provides excellent learning opportunities through recognized, accomplished speakers but also provides opportunities to get an understanding of products from service providers that may add value to your clients.

Senior Wealth Counselor  
**Waldron Wealth Management**

I found the event relevant, timely and thoroughly enjoyable.

Vice President and Senior Investment Advisor  
**PNC Wealth Management**

The Summit was well orchestrated and engaging. I would definitely attend another marcus evans event. The Summit provided me a great way to source new and innovative managers.

Managing Partner  
**McKean and McMills Multi Family Office**

Excellent first class event!

Senior Vice President and Director  
**Swiss Asset Advisors**

More valuable than the formal meetings was the opportunity at meals to meet brilliant innovative professionals who add to the value we bring to clients.

President  
**Prosper Advisors LLC**