FAMILY OFFICE forum

Swissôtel Chicago * June 8 – 10, 2009	
Day One: Monday, June 8	
8:00	***Day One Registration***
9 am-12pm	**Interactive Executive Masterclass** **FAMILY OFFICE FROM A to Z: Structuring and Streamlining the Most Effective Family Organization** Rhona Vogel, *President & Founder,* **VOGEL CONSULTING** Sara Hamilton*, Founder and CEO,* **FAMILY OFFICE EXCHANGE** Richard Morris, *Principal,* **ROI CONSULTING**
12:00	***Luncheon for Workshop Participants***
Enhancing the Organization for More Informed Decisions	
1:00	**Opening Remarks: Main Day Chairperson** Robert Francais, *CEO,* **ASPIRANT** (MFO)
1:15	**Collaboration in Family Wealth: Sustaining Growth in This New World Order** **Moderator:** Thomas R. Livergood, *CEO,* **THE FAMILY WEALTH ALLIANCE, WHEATON, IL** **Panelists:** Christine K. Galloway, *CEO,* **OKABENA COMPANY, MINNEAPOLIS, MN** Edward M. Lazar, *President,* **THRESHOLD GROUP, GIG HARBOR, WA**
2:00	**Asset Protection: Preserving Your Wealth for Generations to Come Through Innovative Structuring Strategies.** Thomas J. Handler, J.D., P.C, *Partner,* **HANDLER THAYER & DUGGAN**
3:00	***Networking Refreshment Break-Make New Connections and Build on Existing Relationships***
Bridging The Gap Through Key Transitions	
3:30	**Empowering the Next Generation and Enriching the Family Legacy Through Impactful Philanthropy** **Moderator:** Bruce Boyd, *Principal and Managing Director,* **ARABELLA PHILANTRHOPIC INVESTMENT ADVISORS** **Panelists:** Chris Galvin, *Former CEO,* **MOTOROLA** Dr. Giampaolo Parigi, **PARIGI FAMILY OFFICE** Jeff Lauterbach, *Family Advisor*, **LAUTERBACH & CO**
4:30	**Pinpointing Future Opportunities for Multi-Family Offices: Paving the Road for An Evolving Business Model** Rob Francais, *COO*, **ASPIRIANT (MFO)** Rick Pitcairn, *Chief Investment Officer and 4th Generation Family Member,* **PITCAIRN** (MFO) John Elmes, *Senior Partner*, **GENSPRING FAMILY OFFICES** (MFO)
5:45	**Champagne Roundtables and Welcome Reception** **Roundtable Topics:** **1. Improving Operations with Technology in the Family Office:** Jud Bergman, *Founder and CEO***, Envestnet** **2. Achieving Returns in Today's Market:** Serge Troyanovsky, Director, **BNP Paribas** **3. The Family Office Model: Is bigger better?** John T. Elmes, CFA, Senior Partner, **GENSPRING FAMILY OFFICES, (MFO)** **4. Human Capital: Solving the Equation:** Linda C. Mack, President, **MACK INTERNATIONAL, LLC** **5. Family Business Owners and the Family Office:** Greg Rogers, *Founder and President,* **RAYLIGN ADVISORY LLC** **6. The Recession and its Impact on Family Office Business Opportunities:** Rob Francais, *COO***, ASPIRIANT (MFO)** **7. Structuring the Family Office: Making the right decisions:**Tom Meilinger, **VOGEL CONSULTING** **8. High Impact Philanthropy:** Scott Oki, *Co-Founder,* **MICROSOFT ALUMNI FOUNDATION**; **The OKI FOUNDATION** **9. Beyond Product: The Sustainability of the Advice Model in the MFO:** Rick Pitcairn, *CIO & 4th Gen Family Member,* **PITCAIRN** **10. Enhancing Due Diligence: Strategies and Advice for Greater Protection:** Steve Braverman, *President,* **HARRIS MYCFO (MFO)**
6:15	***Evening Entertainment with Live Music by*** Suenalo, Creators of "GOGO" (Guitars over Guns Operation)

Day Two: Tuesday, June 9			
7:30	**Closed-Door Family Breakfast: The Private Exchange - Exclusively for Families and Private Family Office Executives (By Invitation Only) Sponsored by RyHolland Fielder**		
8:45	**Opening Remarks: Conference Chairperson** Robert Francais, *CEO,* **ASPIRANT** (MFO)		
9:00	**Family Business to Family Office: Transitions, Integration and Separation** **Moderator:** Joel Treisman, *Chairman*, **TIGER 21** **Panelists:** Fort Flowers, *President and CEO,* **SENTINEL TRUST COMPANY** (MFO) Benjamin Oehler, *President and Founder,* **BASHAW GROUP** Greg Rogers, *Founder and President,* **RAYLIGN ADVISORY LLC** Leslie C. Quick, III, *Founding Partner*, **MASSEY QUICK & CO., LLC**		
	Adapting to Succeed in a New Economy		
10:00	**Beyond Country Club Due Diligence: Mitigating Investment Risk, Avoiding Fraud and Ensuring Transparency- Essential Tactics to Protect Future Investments** Steve Braverman, *President,* **HARRIS MYCFO** (MFO)		
10:30	**Bull or Bear? Achieving Market Neutral Hedge Fund Returns with Transparency, Liquidity and Fee Efficiency: Focus on Commodities and Protection With the New Generation of Systematic Investment Strategies** Serge Troyanovsky, *Director*, **BNP PARIBAS**		
11:10	***Networking Break***		
11:40	**Global Credit Markets and Distressed Debt Investing: Forecasting Future Conditions and Understanding the Implications of Today** Edward I. Altman, Creator of the Z-Score, the most widely used indicator for predicting bankruptcy		
12:40	**Networking Luncheon**		
Tracks	**Track A: Collaboration Between Generations** **Chaired by: Joel Treisman,** *Chairman*, **TIGER 21**	**Track B: Operational Best Practices** **Chaired by: Michael J. Brink, CLU, AEP,** ***Principal,*** **PELAGOS ADVISORS LLC**	**Track C: Investment and Wealth Preservation** **Chaired by: Bill Friend,** ***President, Core Capital and Principal, HARRIS HOLDINGS*** **(SFO)**
1:40	**Private Affair: Overcoming Obstacles to Family Governance and Education** *Open to family members only (extended family, children and spouses encouraged to attend)* **Leader:** Mark Casella, **COPPERTREE LTD** (family member)	**Interactive Roundtable Discussion: New Vistas in Human Capital** Charles Meek, *Founder and President* ,**EXECUTIVE LEADERSHIP RESOURCES, LLC**	**Credit and Risk** Robert Bernstein, *Managing Member,* **PRISM GLOBAL ADVISORS** (SFO) David Smilow, *Chairman,* **JEFFERSON NATIONAL**
2:40	**Inside the Board Room: Challenges in the Family Office** **Moderator:** David Lansky, Ph.D., **THE FAMILY BUSINESS CONSULTING GROUP, INC.** **Panelists:** Daniel Thiem, **ROYAL MANAGEMENT COROPORATION** Richard Morris, **ROI CONSULTING** Tom Pazol, **CYCLONE MANAGEMENT** Benjamin Shapiro, **MASON AVENUE INVESTMENTS , LLC** (SFO) Matthew Shapiro, **MASON AVENUE INVESTMENTS, LLC,** (SFO) Brendan Wall, **WALL FAMILY ENTERPRISE** (SFO) Mary Wall Yeager, **WALL FAMILY ENTERPRISE** (SFO)	**Family Office Technology: The Top 10 Things to Know & Using Portfolio Theory for IT Decision Making** Bryan Bell, *Founder and President,* **SYNTH-BANK** Jud Bergman, *Founder and CEO,* **Envestnet**	**Building Trust and Empathy with Clients in Volatile Times** Gary Shunk, *Principle,* **Wealth Psychology** Joe Calabrese, *President*, **HARRIS MYCFO** (MFO) Tim Volk, **Volk Family Office** (SFO)

3:40	*Networking Break*		
4:10	**The Changing Role of Women in Affecting the Family's Wealth** **Moderator:** Amy Schuman, Principal, **Family Business Consulting Group, Inc.** **Panelists:** Sarah Schmidt, *Schmidt Family President and Director,* **U.S. Oil Co., Inc** (Family Business) Renee Togher, *President,* **Azteca Foods** (Family Business) Martha Jahn Martin, *Vice President Human Resources,* **Chicago Metallic Corporation** (Family Business)	**Innovative Tax and Estate Planning Techniques: Protecting Wealth From Emerging Threats** Philip J Tortorich, **KATTEN MUCHIN ROSENMAN LLP**	**Hedge Funds: Debating the Future and Pinpointing Opportunities** Bill Friend, *President, Core Capital and Principal,* **HARRIS HOLDINGS** (SFO) Charles Krusen, *CIO,* **KRUSEN FAMILY OFFICE** (SFO) Daniel Curran, *Managing Partner,* **CURRAN FAMILY LIMITED PARTNERSHIP**
4:50	**Structuring the New Criteria for Evaluating and Selecting Effective Wealth Managers** Brian Hughes, *Managing Director,* **THRESHOLD GROUP** Linda Bourn, *Managing Director*, **CLEARBROOK PARTNERS** Charles Grace III, *Board of Directors*, **ASHBRIDGE**	**High-Impact Philanthropy: Redefining the Charity Model to Enable Effective Organizations When Every Dollar Counts** **Moderator:** Bruce Boyd, *Principal and Managing Director,* **ARABELLA PHILANTRHOPIC INVESTMENT ADVISORS** **Presenters:** Chuck Hirsch, *President,* **MICROSOFT ALUMNI FOUNDATION** Scott Oki, *Co-Founder,* **MICROSOFT ALUMNI FOUNDATION**; *Chief Volunteer,* **The OKI FOUNDATION** Steve Mariotti, *President,* ***NATIONAL FOUNDATION FOR TEACHING ENTREPRENEURSHIP*** **(NFTE)**	**OPPORTUNITIES IN TODAY'S MARKET: Rebalancing the Portfolio to Gain a Fresh Perspective on Asset Allocation in the New Economy** Rich Masino, *CIO,* **NORTHSHORE CAPITAL MANAGEMENT, LLC** and *Founder,* **MASINO FAMILY OFFICE** Douglas E. Bryant, *Vice President & CFO,* **COCKRELL INTERESTS, INC.**
5:35	***End of Main Day Two***		
6:00	**Welcoming Drinks on the River: Chicago's Famous Architecture Cruise**		
Day Three: Wednesday, June 10th, 2009			
8:25	**Opening Remarks: Conference Chairperson** Linda C. Mack, President, **MACK INTERNATIONAL, LLC**		
8:30	**Protecting the Portfolio: Using Convertible Bonds to Preserve and Grow Family Wealth** Greg Miller, CPA, *CEO,* **WELLESLY INVESTMENT ADVISORS, INC.**		
9:30	**On the Pulse Research Sampler: A Roundup of the Best Research in the Industry - PLUS! Hear the the Exclusive Results from our Pre-Conference Survey** Tom Livergood, *CEO*, **THE FAMILY WEALTH ALLIANCE** Sara Hamilton, *Founder and CEO,* **FAMILY OFFICE EXCHANGE**		

Risk Management and Wealth Preservation in a Volatile Economy	
10:15	**In-House vs. Outsource: Maintaining Control Without Sacrificing Quality** **Four Branches, Four Family Office Structures:** **SFO:** Richard Morris, *Principal,* **ROI CONSULTING** **Private MFO:** Paul Lehman**,** *Managing Director*, **AUSTIN- LEHMAN ADVENTURES** **Virtual Family Office:** Dennis Kessler, *Principal***,** **FAMILY BUSINESS INNOVATIONS** **Fully Outsourced Family Office:** David Weinberg, *President*, **DAVID WEINBERG GALLERY**
11:15	***Networking Break***
11:45	**Enhancing Transparency Through Insurance Innovations** Michael J. Brink, CLU, AEP, *Principal,* **PELAGOS ADVISORS LLC** Jim Kane, *President*, **HUB INTERNATIONAL**
12:45	***Networking Luncheon***
1:45	**The New Tax Landscape: Achieving Maximum Tax Efficiencies and Preparing for Major Impacts of Proposed and Emerging Legislation** Joseph Karczewski, *Managing Director*, **WTAS LLC**
2:30	**Wrap Up Discussion Session**
3:30	***Conference Concludes***