

## Agenda

### TUESDAY, JULY 21

REGISTRATION	10:00 a.m.	Lucerne Foyer
LUNCH	11:30 a.m.	Alpine
WELCOME AND INTRODUCTION	12:15 p.m.	Lucerne
THE FIVE TECHNOLOGY ADOPTION METHODS: BUILD, UPGRADE, LICENSE, OUTSOURCE OR HYBRID – WHICH ONE IS RIGHT FOR YOU?	12:30 p.m.	Lucerne
CASE STUDY: EVALUATION AND REMEDIATION OF TECHNOLOGY RISKS IN A FAMILY OFFICE	1:15 p.m.	Lucerne
TECHNOLOGY DEMONSTRATIONS: SOLUTION INTRODUCTIONS	2:15 p.m.	Lucerne
AFTERNOON BREAK	2:45 p.m.	Lucerne Foyer
TRANSFORMING DATA INTO INTELLIGENCE	3:00 p.m.	Lucerne 3
TECHNOLOGY SOLUTIONS DEMONSTRATIONS (1)	3:00 p.m.	
ADDEPAR		Zermatt
BACKSTOP SOLUTIONS GROUP		St. Moritz
EXTERNAL IT		Alpine 1
FUNDCOUNT		Lucerne 2
NETAGE		Lucerne 1
NORTHERN TRUST		Alpine 2
PRIVATE CLIENT RESOURCES		Grindelwald
SS&C TECHNOLOGIES		Gstaad
TRUSTED FAMILY		Verbier
TECHNOLOGY SOLUTIONS DEMONSTRATIONS (2)	3:30 p.m.	See above
TECHNOLOGY SOLUTIONS DEMONSTRATIONS (3)	4:00 p.m.	See above
HUMAN CAPITAL NETWORK	4:40 p.m.	Lucerne 1
TECHNOLOGY OPERATIONS & DATA SECURITY NETWORK	4:40 p.m.	Lucerne 2/3
ADJOURNED	5:40 p.m.	
NETWORKING RECEPTION	5:40 p.m.	Edelweiss Suite (43 <sup>rd</sup> floor)
EVENING CONCLUDES	7:00 p.m.	

## Agenda (continued)

### WEDNESDAY, JULY 22

<b>BREAKFAST / REGISTRATION / EXHIBITS</b>	<b>7:30 a.m.</b>	<b>Alpine</b>
<b>OPENING COMMENTS</b>	<b>8:15 a.m.</b>	<b>Lucerne</b>
<b>TAX AND ESTATE UPDATE</b>	<b>8:30 a.m.</b>	<b>Lucerne</b>
<b>FINANCIAL EXECUTIVE DIALOGUE:</b>		
<b>SMALL OFFICE (1-6 Employees)</b>	<b>10:00 a.m.</b>	<b>Alpine 2</b>
<b>MEDIUM OFFICE (7-14 Employees)</b>	<b>10:00 a.m.</b>	<b>Alpine 1</b>
<b>LARGE OFFICE (15+ Employees)</b>	<b>10:00 a.m.</b>	<b>Lucerne 1</b>
<b>MFO, THOUGHT LEADER &amp; WEALTH ADVISOR COUNCILS</b>	<b>10:00 a.m.</b>	<b>Lucerne 2/3</b>
<b>TECHNOLOGY PROVIDERS</b>	<b>10:00 a.m.</b>	<b>Zermatt/Gstaad</b>
<b>BREAK</b>	<b>9:45 a.m.</b>	<b>Lucerne Foyer</b>
<b>LEGISLATIVE UPDATES FROM OUR NATION'S CAPITOL</b>	<b>11:30 a.m.</b>	<b>Lucerne</b>
<b>CLOSING COMMENTS</b>	<b>12:15 p.m.</b>	<b>Lucerne</b>
<b>ADJOURNED</b>	<b>12:25 p.m.</b>	<b>Lucerne</b>



## Technology Demonstrations July 21

- Addepar** - Zermatt
- Backstop Solutions** - St. Moritz
- Northern Trust** - Alpine 2
- External IT** - Alpine 1
- FundCount** - Lucerne 2
- Netage Solutions** - Lucerne 1
- Private Client Resources** - Grindelwald
- SS&C Technologies** - Gstaad
- Trusted Family** - Verbier

## Breakout Sessions July 21

- Human Capital Network** - Lucerne 1
- Technology Operations & Data Security Network** - Lucerne 2/3

## Financial Executive Dialogue by Office Type July 22

- Small Office**  
(1-6 Employees) - Alpine 2
- Medium Office**  
(7-14 Employees) - Alpine 1
- Large Office**  
(15+ Employees) - Lucerne 1
- Multi-family Office Council,  
Thought Leaders Council, and  
Wealth Advisor Council**  
Lucerne 2/3
- Technology Providers**  
Zermatt/Gstaad

\*Meals will be served in rooms  
Alpine 1 and 2.