

Agenda

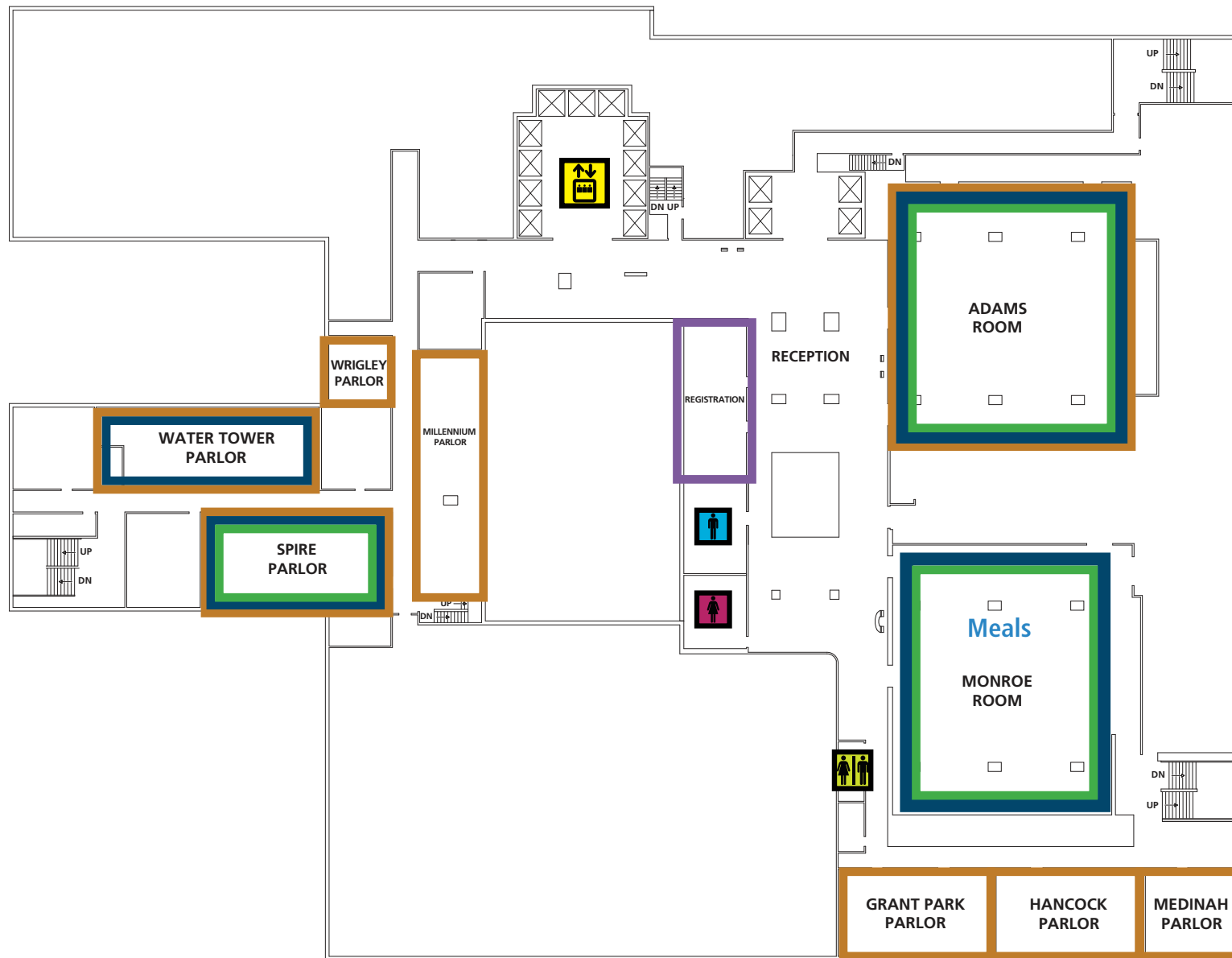
Tuesday, July 22

REGISTRATION	11:30 a.m.	6 th floor Foyer
LUNCH	12:00 p.m.	Monroe
WELCOME/FOX INITIATIVES FOR 2014	1:00 p.m.	Adams
DON'T START AT SQUARE ONE – IMPLEMENTING TECHNOLOGY	1:15 p.m.	Adams
REPORTING REALITIES: OVERCOMING TODAY'S BIGGEST CHALLENGES	2:15 p.m.	Adams
TECHNOLOGY SOLUTIONS SHOWCASE – SOLUTION INTRODUCTIONS	3:10 p.m.	Adams
BREAK – TECHNOLOGY SOLUTIONS SHOWCASE –SESSIONS 1	3:30 p.m.	
ADVENT		Water Tower Parlor
CABINET		Medinah Parlor
INVESTCLOUD		Hancock Parlor
NORTHERN TRUST		Grant Park Parlor
PCR		Millenium Parlor
SOLVER		Adams
SUNGARD		Wrigley Parlor
WEALTHTOUCH		Spire Parlor
PEER DIALOGUE BY TOPIC:		
FAMILY EDUCATION	4:00 p.m.	Monroe
HUMAN CAPITAL	4:00 p.m.	Spire Parlor
CYBER SECURITY	4:00 p.m.	Adams
D&O/E&O INSURANCE	4:00 p.m.	Water Tower Parlor
TECHNOLOGY SOLUTIONS SHOWCASE – SOLUTION SESSIONS 2	5:00 p.m.	See above
ADJOURNMENT	5:30 p.m.	
NETWORKING RECEPTION	5:30 p.m.	Adams Foyer
EVENING CONCLUDES	7:00 p.m.	

Agenda (Continued)

Wednesday, July 23

BREAKFAST	7:30 a.m.	Monroe
OPENING COMMENTS	8:15 a.m.	Adams
TAX AND ESTATE UPDATE	8:30 a.m.	Adams
BREAK – TECHNOLOGY SOLUTIONS SHOWCASE – SESSIONS 3	10:00 a.m.	
ADVENT		Water Tower Parlor
CABINET		Medinah Parlor
INVESTCLOUD		Hancock Parlor
NORTHERN TRUST		Grant Park Parlor
PCR		Millenium Parlor
SOLVER		Adams
SUNGARD		Wrigley Parlor
WEALTHTOUCH		Spire Parlor
FINANCIAL EXECUTIVE DIALOGUE:		
SMALL OFFICE	10:30 a.m.	Monroe
MEDIUM OFFICE	10:30 a.m.	Spire Parlor
LARGE OFFICE	10:30 a.m.	Adams
MFOs, THOUGHT LEADERS & WEALTH ADVISORS	10:30 a.m.	Wabash, 3rd floor
HUMAN CAPITAL TRENDS AND INSIGHTS	11:45 a.m.	Adams
CLOSING COMMENTS	12:25 p.m.	Adams
ADJOURNMENT	12:30 p.m.	Adams



Technology Demos July 22 - July 23

- Advent - Water Tower Parlor
- Wealth Touch - Spire Parlor
- Sungard - Wrigley Parlor
- PCR - Millennium Parlor
- Northern Trust - Grant Park Parlor
- Investcloud - Hancock Parlor
- Cabinet - Medinah Parlor
- Solver - Adams Room

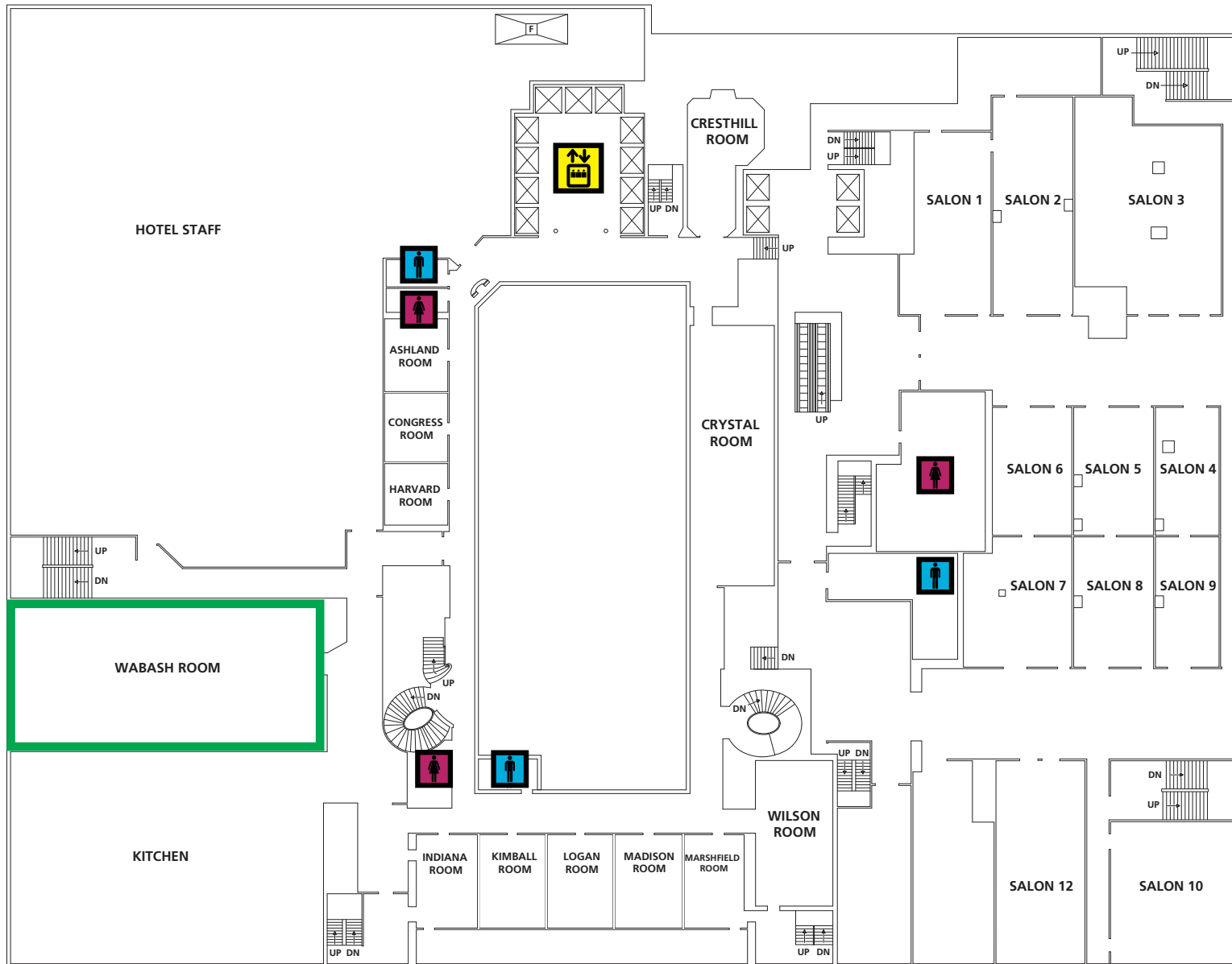
Peer Dialogue by Topic July 22

- Cyber Security - Adams Room
- Family Education - Monroe Room
- D&O/E&O Insurance - Spire Parlor
- Human Capital - Water Tower Parlor

Peer Dialogue by Office Type July 23

- Small SFO - Monroe Room
- Medium SFO - Spire Parlor
- Large SFO - Adams Room

*Meals will be served in the Monroe Room.



Peer Dialogue by Office Type
July 23

Multi-Family Office / Thought
Leader / Wealth Advisor - Wabash
Room