



Welcome to the 2013 Wealth Advisor Forum

Wednesday, May 1

BREAKFAST **7:30 a.m.** **Alhambra Ballroom**

OPENING COMMENTS **8:30 a.m.** **Granada Ballroom**

**A STRATEGIC OUTLOOK FOR THE PRIVATE
BUSINESS OWNERS OVER THE NEXT DECADE** **8:45 a.m.** **Granada Ballroom**

**UNDERSTANDING THE IMPORTANCE OF PRIVATE
CAPITAL IN GLOBAL ECONOMIES**

David Friedman, WealthX

**PRIVATE BUSINESS OWNERS FACING STRATEGIC
ISSUES**

Sara Hamilton, Family Office Exchange

**ENGAGING PRIVATE BUSINESS OWNERS IN
CRITICAL CONVERSATIONS**

Alexandre Monnier, Family Office Exchange

Mel Lagomasino, Wealth Enterprises Family Offices

Mark Rubin, FTI Consulting

BREAK **10:15 a.m.** **Alhambra Ballroom**

ROOT FAMILY ENTERPRISE IN THE 21ST CENTURY **10:45 a.m.** **Granada Ballroom**

Karen Neal, Family Office Exchange

Preston Root, Root Family Board of Directors

LUNCH **12:00 p.m.** **Center Terrace**

**KEYNOTE: HOW TO BUILD YOUR CORPORATE
BRAND IN TODAY'S MEDIA ENVIRONMENT** **1:00 p.m.** **Granada Ballroom**

Howard Bragman, Reputation.com

BREAK **2:00 p.m.** **Alhambra Ballroom**

**PROFITABILITY, TALENT AND THE COMPETITIVE
LANDSCAPE** **2:30 p.m.** **Granada Ballroom**

David Lincoln, Family Office Exchange

Thomas Melcher, Hawthorn

Michael Cole, Ascent

Leslie Voth, Pitcairn

ASK THE EXPERT BREAKOUTS

CULTURE CONSIDERATIONS AND INTEGRATION 4:15 p.m. Alhambra Ballroom

Thom Melcher, Hawthorn

ATTRACTING TALENT FROM OUTSIDE YOUR ORGANIZATION 4:15 p.m. Granada Ballroom

Michael Cole, Ascent

NURTURING THE NEXT GENERATION WITHIN YOUR ORGANIZATION 4:15 p.m. Anastasia Room

Leslie Voth, Pitcairn

PROFITABILITY, TALENT & THE COMPETITIVE LANDSCAPE 4:15 p.m. Prado Room

David Lincoln, Family Office Exchange

WRAP UP & CLOSING COMMENTS 5:15 p.m. Granada Ballroom

ADJOURNMENT 5:30 p.m. Granada Ballroom

COCKTAIL RECEPTION AND DINNER 6:30 p.m. Southwest Terrace

Thursday, May 2

BREAKFAST 7:30 a.m. Alhambra Ballroom

Opening Comments 8:30 a.m. Granada Ballroom

Alexander Monnier, Family Office Exchange

INVESTMENT PERSPECTIVES: OWNER ATTITUDES AND BEHAVIORS, 2013 8:45 a.m. Granada Ballroom

Sara Hamilton, Family Office Exchange

BREAK 9:30 a.m. Alhambra Ballroom

THE NEXT WAVE OF CHANGE 10:00 a.m. Granada Ballroom

Dan Schawbel, Millennial Branding

CLOSING COMMENTS 12:15 p.m. Granada Ballroom

ADJOURNMENT 12:30 p.m. Granada Ballroom

LUNCH 12:30 p.m. Center Terrace