



## Welcome to the 2013 Financial Executives Forum

Wednesday, July 17

**LUNCH** ..... **12:00 p.m.** ..... **St. Clair**

**OPENING COMMENTS** ..... **1:00 p.m.** ..... **Lakeshore Ballroom West**

**FOX RESEARCH RESULTS** ..... **1:15 p.m.** ..... **Lakeshore Ballroom West**

Jane Flanagan, Family Office Exchange

**TECHNOLOGY TRENDS: THE NEXT WAVE OF  
INNOVATION AND HOW IT IMPACTS**

**THE FAMILY OFFICE** ..... **1:30 p.m.** ..... **Lakeshore Ballroom West**

Michael Sallas, Family Office Exchange

Craig Cook, Oakbrook Solutions

Mark Rogozinski, RockIT

**BE VIGILANT. BE PREPARED. BE PROACTIVE.** ..... **2:15 p.m.** ..... **Lakeshore Ballroom West**

**CYBER SECURITY**

Christopher Liu, AIG

**SOCIAL ENGINEERING**

Chuck Fawcett, Tristate

**PERSONAL SECURITY**

Tom Kasza, Hillard Heintze

**BREAK** ..... **3:15 p.m.** ..... **Lakeshore Ballroom Foyer**

**BREAKOUT SESSIONS:**

**BUSINESS CONTINUITY IN THE WAKE OF**

**HURRICANE SANDY** ..... **3:30 p.m.** ..... **Lakeshore Ballroom West**

Michael DuBose, HUB International Personal Insurance

**HR MATTERS** ..... **3:30 p.m.** ..... **Lakeshore Ballroom East**

Ruth Easterling, Family Office Exchange

Sharon Geocaris, The Benida Group, LLC

Colleen Monfare, RDV Corporation

Karan Peare, Mathile Enterprise (CYMI, LTD)

**PEER DIALOGUE BY TOPIC:**

<b>TECHNOLOGY</b>	<b>4:30 p.m.</b>	<b>St. Clair 1-2</b>
<b>RISK MANAGEMENT</b>	<b>4:30 p.m.</b>	<b>St. Clair 3</b>
<b>HR MATTERS</b>	<b>4:30 p.m.</b>	<b>Michigan</b>

**ADJOURNMENT** ..... **5:30 p.m.**

**WELCOME RECEPTION** ..... **6:00 p.m.** ..... **Lakeshore Ballroom Foyer**

**Thursday, July 18**

**BREAKFAST** ..... **7:30 a.m.** ..... **Lakeshore Ballroom East**

**OPENING COMMENTS** ..... **8:00 a.m.** ..... **Lakeshore Ballroom West**

**ESTATE AND INCOME TAX PLANNING  
IN THE NEW AGE OF CERTAINTY** ..... **8:15 a.m.** ..... **Lakeshore Ballroom West**

Thomas Abendroth, Schiff Hardin LLP  
Robert Pluth Jr., Schiff Hardin LLP

**LEGISLATIVE UPDATES FROM OUR  
NATION'S CAPITAL** ..... **9:15 a.m.** ..... **Lakeshore Ballroom West**

Jeff Cook-McCormac, Policy and Taxation Group

**BREAK** ..... **10:00 a.m.** ..... **Lakeshore Ballroom Foyer**

**EXECUTIVE DIALOGUE BREAKOUTS:**

**SMALL OFFICE** ..... **10:15 a.m.** ..... **St. Clair 1-2**

**MEDIUM OFFICE** ..... **10:15 a.m.** ..... **St. Clair 3**

**LARGE OFFICE** ..... **10:15 a.m.** ..... **Michigan**

**MULTI-FAMILY OFFICE & THOUGHT LEADERS** ..... **10:15 a.m.** ..... **Lakeshore Ballroom East**

**BREAK** ..... **11:15 a.m.** ..... **Lakeshore Ballroom Foyer**

**BEST PRACTICES: INTERNAL CONTROLS** ..... **11:30 a.m.** ..... **Lakeshore Ballroom West**

Lou Colella, Walnut Ridge Strategic Management Co.  
Christopher Cutrara, Plante Moran

**CLOSING COMMENTS** ..... **12:30 p.m.** ..... **Lakeshore Ballroom West**

**ADJOURNMENT** ..... **12:45 p.m.** ..... **Lakeshore Ballroom West**