

Tuesday, July 19, 2016

Registration	10:00 a.m.	Lucerne Foyer
Optional Speed Networking	11:00 a.m.	Lucerne Ballroom
Luncheon	11:45 a.m.	Alpine Ballroom
Welcome and Introduction	12:30 p.m.	Lucerne Ballroom
<p>Speaker: <i>Alexandre Monnier, President Family Office Exchange</i></p>		
Technology Disruptors and the Internet of Things	12:40 p.m.	Lucerne Ballroom
<p>Speaker: <i>Kumar Krishnamurthy, Partner/Principal PricewaterhouseCoopers Advisory LLC</i></p> <p>Host: <i>Amy Hart Clyne, Executive Director, Knowledge Center Family Office Exchange</i></p>		
Technology Demonstrations: Solution Introductions	1:30 p.m.	Lucerne Ballroom
<p>Host: <i>Sandra Ditore, Senior Business Development Manager Family Office Exchange</i></p>		
Networking Break	2:00 p.m.	Lucerne Foyer
<p>Live Technology Demonstrations: <u>Each demonstration will be repeated three times.</u></p>		
Session 1	2:30 – 2:55 p.m.	
Session 2	3:05 – 3:30 p.m.	
Session 3	3:40 – 4:10 p.m.	
<p>Addepar – <i>Investment management reporting platform</i>.....<i>Alpine 2</i></p> <p>Archway Technology Partners – <i>Integrated G/L, portfolio management and reporting solution</i>.....<i>Alpine 1</i></p> <p>Backstop Solutions Group – <i>Platform for managing investment portfolios securely</i>.....<i>Zermatt</i></p> <p>Dynamo Software – <i>Portfolio management and reporting platform</i>.....<i>Rhone (3rd Floor)</i></p> <p>External IT – <i>Secure IT workplace</i>.....<i>Currents (Concourse Level)</i></p> <p>FundCount – <i>Integrated accounting and reporting software</i>.....<i>Gstaad</i></p> <p>Northern Trust Wealth Passport – <i>Personalized reporting portal</i>.....<i>Grindelwald</i></p> <p>Private Client Resources – <i>Industry-leading data for a total wealth view and deeper client communication</i>.....<i>St. Moritz</i></p> <p>Solovis – <i>Portfolio management reporting</i>.....<i>Verbier</i></p> <p>SS&C Technologies – <i>Private capital platform</i>.....<i>Neuchatel (3rd Floor)</i></p> <p>Trusted Family – <i>Secure family communication platform</i>.....<i>Bianco (3rd Floor)</i></p>		
Networking Break	4:10 p.m.	Lucerne Foyer

Concurrent Breakout Sessions4:30 p.m.**Securing Client Communications: Trends and New Technology****Lucerne 1****Speaker:** Steven Draper, Senior Consultant
Family Office Exchange**Social Media: The New Liability Frontier****Lucerne 2****Speaker:** David Hubbard, Vice President, Marketing
Private Client Group/AIG Property Casualty
Host: Patience Marmer, Senior Relationship Manager
Family Office Exchange**Family Office Portal****Lucerne 3****Speaker:** Dulcie L. Truitt, President and CEO
Briar Hall LLC
Host: Ruth Easterling, Managing Director, Member Services
Family Office Exchange**Networking Reception.....5:30 p.m.****Edelweiss
Penthouse
(43rd Floor)**

Wednesday, July 20, 2016

Breakfast	7:30 a.m.	Alpine
Opening Comments and Day One Recap	8:15 a.m.	Lucerne Ballroom
<i>Speaker: Mariann Mihailidis, Managing Director, Councils, Family Office Exchange</i>		
Tax and Estate Update	8:25 a.m.	Lucerne Ballroom
<i>Speakers: Thomas W. Abendroth, Partner Schiff Hardin LLP Mark Blumenthal, Partner Plante Moran PLLC</i>		
<i>Host: Karen Rush, Director of Membership Family Office Exchange</i>		
New Tools for Strengthening FOX Peer Communities	9:30 a.m.	Lucerne Ballroom
<i>Speaker: John Cisek, Managing Director, Operations Family Office Exchange</i>		
Networking Break	9:45 a.m.	Lucerne Foyer
Executive Dialogues	10:05 a.m.	
	<u>Small Offices (1-6 Employees)</u>	Lucerne 2/3
	<u>Medium Offices (7-14 Employees)</u>	Lucerne 1
	<u>Large Offices (Over 15 Employees)</u>	Alpine 1
	<u>Multi-Family Office, Thought Leaders, and Wealth Advisor Councils</u>	Currents <i>(Concourse Level)</i>
	<u>Technology Demonstration Providers</u>	Alpine 2
Networking Break	11:15 a.m.	Lucerne Foyer

Concurrent Breakout Sessions11:30 a.m.

IRS Updates: Global High Wealth Examinations

Lucerne 1

Speaker: *Ethelyn McDaniel, Director, Tax
PricewaterhouseCoopers, LLP*

Host: *Mariann Mihailidis, Managing Director, Councils
Family Office Exchange*

Estate Settlement Readiness

Alpine 2

Speakers: *John DeBord, Senior Vice President of Operations
LHT Consulting Group*
*Mark Harder, Partner
Warner Norcross & Judd LLP*
*Jeff Lambert, Chief Financial Officer, Assistant Secretary
RDV Corporation*

Host: *Heather Abramson, Senior Relationship Manager
Family Office Exchange*

Family Office Structures: Pros, Cons and Considerations

Lucerne 2/3

Speakers: *Bobbie Bierhals, Partner
McDermott, Will & Emery, LLP*
*Scott Hirsch, CFO
The Benida Group*
*Thomas P. Ward, Partner
McDermott, Will & Emery, LLP*

Host: *Jane Flanagan, Director of Family Office Research
Family Office Exchange*

Lunch Available12:30 p.m.

Lucerne Foyer

Concurrent FOX Network Discussion Sessions12:45 p.m.



**The Human Capital Network:
Strategic Human Capital Issues Facing the Family Office**

Lucerne 1

Facilitators: *Kasey Mueller, Human Capital Network Moderator
Family Office Exchange*
*Bruce K. Benesh, Partner-in-Charge
Grant Thornton, LLP*



**The Technology Operations & Data Security Network
Using Office 365 in a Family Office: Is it the Future?**

Lucerne 2/3

Facilitator: *Steven Draper, Senior Consultant
Family Office Exchange*

Forum Closing Comments.....1:45 p.m.

Speakers: *Alexandre Monnier, President
Family Office Exchange*

Lucerne 2/3

*Karen Rush, Director of Membership
Family Office Exchange*

Lucerne 1

Adjourn2:00 p.m.