

Tuesday, April 28

BREAKFAST/EXHIBITS **7:30 a.m.** **Alhambra**

**THE EIGHT ELEMENTS OF BUILDING A
FAMILY ENTERPRISE** **8:30 a.m.** **Granada Ballroom**
Alexandre Monnier, Family Office Exchange

WHAT FAMILIES SAY THEY WANT AND NEED! **9:15 a.m.** **Granada Ballroom**
Amy Hart Clyne, Family Office Exchange

NETWORKING BREAK **10:00 a.m.** **Alhambra**

**LEADING THE TEAM: ALIGNING THE GOALS
OF A MULTI-FUNCTIONAL WORK TEAM** **10:30 a.m.** **Granada Ballroom**
Ben Dattner, Dattner Consulting, LLC

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

PEER DIALOGUE **1:45 p.m.** **Granada Ballroom**

NETWORKING BREAK **3:30 p.m.** **Alhambra**

BREAKOUTS

**Breakout 1: FAMILY LEADERSHIP AND
GOVERNANCE** **4:00 p.m.** **Marbella**
R. Kelly Crace, College of William and Mary

**Breakout 2: INTEGRATION: DEVELOPING ADVISOR
TALENT AND TEAM STRUCTURES** **4:00 p.m.** **Granada Ballroom**
Karen Bouche, Greenleaf Trust & Jennifer D. Fox, Hawthorn, PNC Family Wealth

**Breakout 3: HOLDING THE REINS ON
PASSION INVESTMENTS** **4:00 p.m.** **Aragon**
Katja Zigerlig, AIG Private Client Group, Gina Teresi, Commercial Insurance Consultants, & Diana Nawi, Perez Art Museum Miami

Breakout 4: FINANCIAL SECURITY **4:00 p.m.** **Prado**
David Donabedian & Martina Frangis, Atlantic Trust Private Wealth Management
Chris Lowry & Daniel C. Tarlas, Asset Consulting Group, LLC

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

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

Wednesday, April 29**BREAKFAST** **7:30 a.m.** **Alhambra****WELCOME AND LOGISTICS** **9:00 a.m.** **Granada Ballroom****UNDERSTANDING AND APPLYING INDUSTRY TRENDS****TO EXEMPLARY ADVISOR SERVICE** **9:15 a.m.** **Granada Ballroom**

John Benevides, CTC/myCFO, Glen W. Johnson, Mirador Family Wealth, Kevin Tobin, Marsh Private Client Services, & Dennis Wright, The Wellspring Group, LLC

NETWORKING BREAK **10:15 a.m.** **Alhambra****EXPLORING YOUR PERSONAL LEADERSHIP BRAND:****BECOMING THE MASTER-BUILDER OF YOUR FUTURE** **10:30 a.m.** **Granada Ballroom**

Sarah Biggerstaff, Yale School of Management

FORUM WRAP UP –**WHAT ARE MY KEY TAKE-AWAYS?** **12:00 p.m.** **Granada Ballroom****ADJOURNMENT** **12:30 p.m.** **Granada Ballroom****LUNCH** **12:30 p.m.** **Center Terrace**

Biltmore

MIAMI ~ CORAL GABLES

RECREATION & AMENITIES

- 1. Biltmore Tennis Center
- 2. Spa (7th floor)
- 3. Fitness Center
- 4. Pétanque
- 5. Poolside Cabanas
- 6. Premier Golf Fitting
- 7. Golf Starter Shack
- 8. Practice Green
- 9. Driving Range
- 10. Biltmore Culinary Academy

RESTAURANTS & BARS

- 11. Fontana
- 12. Palme d'Or
- 13. Cellar Club Bar
- 14. Biltmore Bar
- 15. Cascade Poolside Grill
- 16. 19th Hole Sports Bar & Grill

SHOPS & BOUTIQUES

- 17. Retail Shop (LL)
- 18. Golf Pro Shop

BALLROOMS

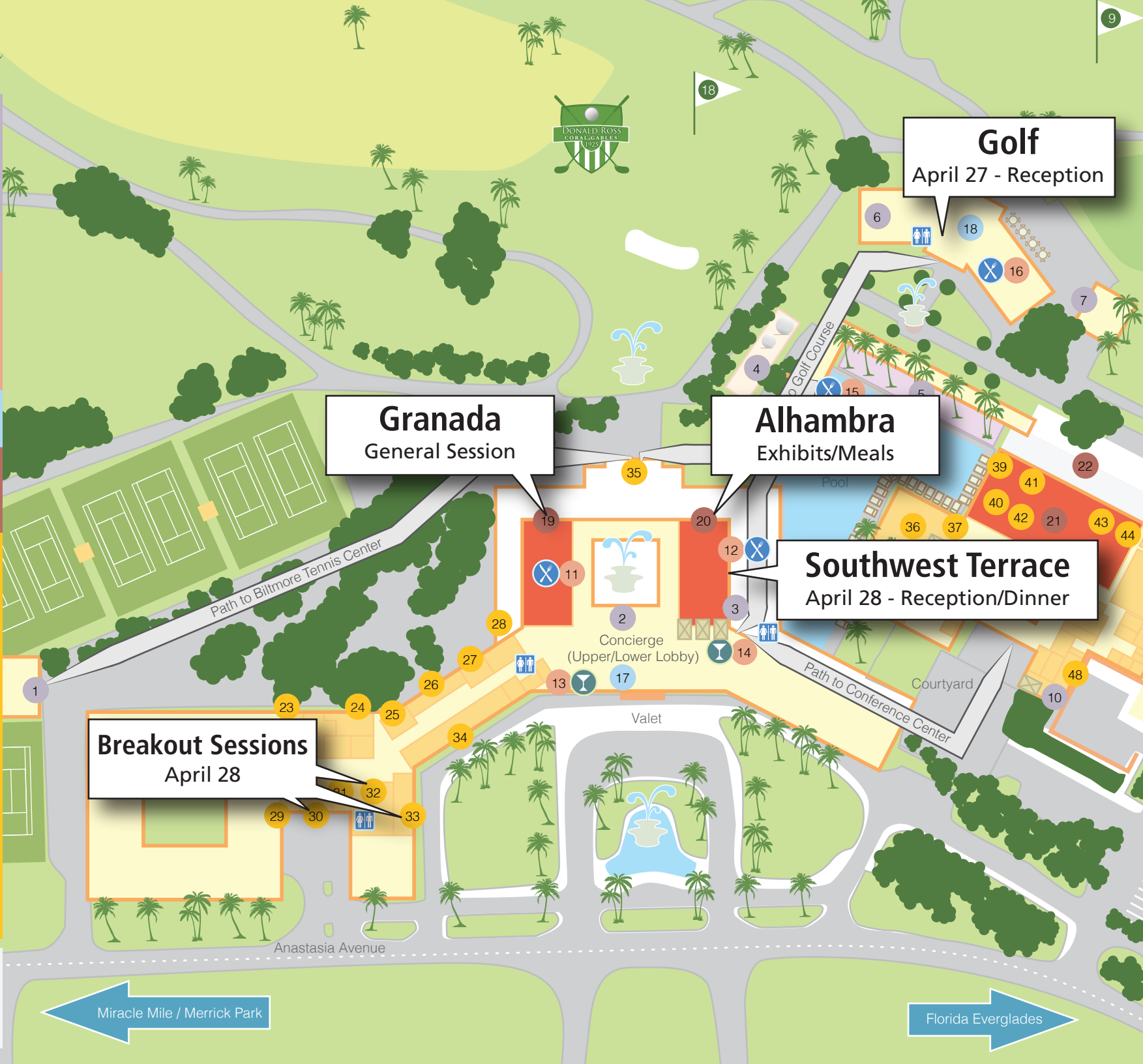
- 19. Granada Ballroom
- 20. Alhambra Ballroom
- 21. Country Club Ballroom
- 22. Country Club Terrace

MEETING SPACES

- 23. Isabella
- 24. Anastasia
- 25. Sevilla
- 26. Biltmore Event Design
- 27. Valencia
- 28. Majorca
- 29. Catalonia
- 30. Aragon
- 31. Santiago
- 32. Prado
- 33. Marbella
- 34. Catering Offices
- 35. Center Terrace/Back Lawn
- 36. Danielson Gallery (LL)
- 37. Fisher
- 38. Laguna
- 39. Brickell (LL)
- 40. Cutler (LL)
- 41. Deering (LL)
- 42. Lightburn (LL)
- 43. Flagler (LL)
- 44. Tuttle (LL)
- 45. Bowman (LL)
- 46. Merrick (LL)
- 47. Stoneman Douglas (LL)
- 48. Boardroom (3rd FL)

LEGEND

- Restaurants
- Bars & Lounges
- Restroom
- Elevators



Golf
April 27 - Reception

Granada
General Session

Alhambra
Exhibits/Meals

Southwest Terrace
April 28 - Reception/Dinner

Breakout Sessions
April 28

Miracle Mile / Merrick Park

Florida Everglades