## Monday, March 16, 2015

3:30-4:30PM **Family Office Registration** – Catalina Foyer

Exhibit Hall Open – Arcadia Foyer

4:30-6:30PM <u>Private Family Office Roundtable</u> – Venice

Roundtable led by Gregory P. Kushner, Founder & President, Lido Consulting, Inc.

**Roundtable Panel Members** 

Timothy Speiss, Vice President, EisnerAmper LLP

Tim Lappen Founder & Chairman, The Family Office Group & The Luxury Home Group,

Jeffer Mangels Butler & Mitchell LLP / JMBM

Preston Tsao, Managing Member, Metcircle Networking LLC

Dr. James Weiner, Co-Founder, Wealth WhispererTM, Inheriting Wisdom

Dr. Carolyn Friend, Co-Founder, Wealth WhispererTM, Inheriting Wisdom

Linda Mack, President, Mack International, LLC

Paul Vogelgesang, Chief Risk Officer, Samueli Family Office

This is a closed-door meeting strictly for the attendees from family offices. Our popular and highly regarded family office roundtable session will allow participants to share candidly amongst themselves, their challenges, and success stories. Our panel of seasoned experts in the area of Family Offices will share what they are currently seeing in their particular areas of expertise and will facilitate the open discussion with our audience of those issues of most concern along with the challenges facing family offices today. The discussions will cover three main areas of interest – Investing, Family Office Administration and Governance. For many, the desire to have impact as a family is as important for sustainability as dealing with the highly technical aspects such as investing and taxes. Our panel will discuss the challenge on how to balance both aspects as part of an offices' integrated planning.

5:30-6:30PM 6:30-8:30PM **General Registration** – Arcadia Foyer

**Welcome Cocktail Reception** – *Arcadia Foyer* 

**Hosted by EisnerAmper LLP** 

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2:55-3:35PM  The Case for Real Assets  Opportunities Across Global Credit,  Macro and Equity Markets  The Path to Energy Independence - Investment Opportunities from the  Market & Investment Opportunities from the						
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GoldenTree Asset Management, LP,  Nuveen Investments  BlueCrest Capital Management & Alps Portfolio Solutions Waypoint Residential, LL	C					
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3:35-3:40PM Walk to Break-Out Session #2  Break-Out Session 2						
Track A Track B Track C Track D						
Direct Private Equity  Building a Private Equity (like)  Portfolio in the Public Markets:  The Misunderstood Power of						
3:40-4:20PM Investments and Co-Investments  Generating Alpha Through  Changing Interest Rates  Duration, High Yield	Short-					
- Why and How?  Concentration  Fixed Income	Short-					
Avalon Advisors, LLC & The Cynosure Group  Lazard Asset Management LLC  Ariel Investments  RealtyMogul.com						
Exhibit Hall Networking Break 4:20-4:40PM						
Hosted by AthenaInvest, Ceres Partners, Insperity and Winston & Strawn LLP 4:40-5:10PM The FBI on Wall Street						
David A. Chaves						
Senior Special Agent, Securities Fraud Program Manager, Federal Bureau of Investigation, New York Division						
5:10-5:30PM   <b>2015 – Provocative Investment Ideas</b>   Joseph M. Hart, Vertical Capital Markets Group						
5:30-5:45PM Utilizing Technology to Work Smarter						
Jason Ozur, Lido Advisors, Inc.						
Joy Hou, METIS Financial Network  DPM Entertainment						
5:45-6:30PM   Entertainment   Jay Leno						
6:30-8:30PM Cocktail Reception – Poolside						

Wednesday, March 18, 2015						
7:30-8:00AM	Registration – Arcadia Foyer Breakfast – Arcadia Ballroom					
8:00-8:05AM	Welcome and Opening Remarks					
	Gregory P. Kushner, Conference Chairman, Chairman and Founder, Lido Consulting, Inc. Alyssa Weinberger, Conference Director, Senior Managing Director/Director of Marketing, Lido Consulting, Inc.					
8:05-8:35AM	Philanthropic Update & Succession Planning: Opportunities for Responsible Investors & Their Advisors					
	Gale A. "Morrie" Granger, PhD, Arthritis National Research Foundation (ANRF)					
	Larry Gilson, Focusing Philanthropy					
	Marc Pollick, The Giving Back Fund					
8:35-8:55AM	Creating a Positive Impact on Youth and Communities					
	Karch Kiraly, Three Time Gold Medal Olympian, Current Head Coach of World's #1 Women's National Volleyball Team					
8:55-9:25AM	Visualizing and Understanding Systemic Risk					
	Ren Y. Cheng, Fidelity Investments					
9:25-9:40AM	How to Access and Complete Principal-to-Principal Real Estate Transactions					
	Joy Hou, METIS Financial Network					
9:40-10:00AM	Living with Deflation: Thoughts on the Next Twenty Years					
	Gina Sanchez, Chantico Global, LLC					
10:00-10:15AM	Networking Break & Walk to Break-Out Session #1 Hosted by AthenaInvest, Ceres Partners, Insperity and Winston & Strawn LLP					
	Break-Out Session 1					
	Track A	Track B	Track C	Track D		
10:15-10:55AM	Next Gen Illiquid & Liquid Strategies to Optimally Grow & Preserve Wealth	Trust Deeds as an Alternative Asset Class	Due Diligence Best Practices for Private Equity Investors in the Middle Market	Alternative Credit: Access Income in Today's Low-Yield Environment		
	Checchi Capital Advisers & Comunidad Realty Partners	Rama Capital Partners, LLC	RCP Advisors, LLC	Franklin Square Capital Partners		
10:55-11:00AM	M Walk to Break-Out Session #2					
	Break-Out Session 2					
11:00-11:40AM	Track A	Track B	Track C	Track D		
	Can You Afford to Have the Wrong Team?	Introduction to Legal Cannabis Investing	The Future of Investment Management is Here – Are You Ready?	Building Portfolios with Consideration to Behavioral Impacts		
	Fireman's Fund Insurance Company & Marsh Private Client Services	MJIC, Inc.	ADDEPAR	Vertical Capital Market Group		
11:40-11:45AM	Walk to Featured Speaker & Keynote Presentation					
11:45-12:30PM	Keynote Speaker – Arcadia Ballroom					
	J. B. Bernstein					
12:30-1:00PM	Lunch – Arcadia Ballroom					
1:00-2:00 PM	Luncheon Speaker – Arcadia Ballroom					
	General Keith B. Alexander, USA (Ret.)					