Monday, February 29, 2016

2:30-3:30PM Family Office Registration – Arcadia Foyer

Exhibit Hall Open – Arcadia Foyer

3:30-6:30PM Private Family Office Roundtable – Arcadia Ballroom

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

Roundtable Panel Members
Timothy Speiss, EisnerAmper LLP
Tim Lappen, The Family Office Group & The Luxury Home Group,
Jeffer Mangels Butler & Mitchell LLP / JMBM
Dr. James Weiner, Wealth WhispererTM, Inheriting Wisdom
Joel Solomon, ChFC, Paradigm Strategic Consulting
Todd Strassman, Houlihan Lokey
Trish Botoff, Botoff Consulting, LLC
Linda Mack, Mack International, LLC

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 General Registration – Arcadia Foyer

6:30-8:30PM Welcome Cocktail Reception – Arcadia Foyer

Hosted by Fidelity Investments

Tuesday, March 1, 2016								
Registration – Arcadia Foyer								
7:30-8:00AM	Breakfast – Arcadia Ballroom							
7:55-8:00AM	Welcome and Opening Remarks							
	Gregory P. Kushner, Conference Chairman, Chairman & Founder, Lido Consulting, Inc.							
	Alyssa Weinberger, Conference Director, Senior Managing Director, Lido Consulting, Inc.							
8:00-8:15AM	Change is Coming in the Family Office Industry: Make Way for a NEW Generation – Arcadia Ballroom							
0.45.0.45.13.6	Pat Soldano, GenSpring Family Office							
8:15-8:45AM	Alternative Investments Panel – Arcadia Ballroom Moderator, Marc Wolf, KPMC							
	Moderator, Marc Wolf, KPMG Stephen Wheeler, HAS Capital, LLC							
	Richard Thomson, Brightwood Capital Advisors, LLC							
8:45-9:10AM	Rethinking Real Estate: Opportunities Beyond REITS – Arcadia Ballroom							
	Jeff Kolitch, Baron Real Estate Fund							
9:10-9:30AM	Getting Real Value from Your Investment Policy Statement – Arcadia Ballroom							
0.20.050434	Timothy Speiss, Eisner Amper LLP							
9:30-9:50AM	Behavorial Portfolio Management – Arcadia Ballroom Professor C. Thomas Howard, Ph.D. Athorn Invest. TM							
9·50-10·10AM	Professor C. Thomas Howard, PhD, AthenaInvest™ Exhibit Hall Networking Break – <i>Arcadia Foyer</i> Hosted by Encore Capital Management, Fairbanks Capital Management, Inc., First Trust Advisors, and Landmark Family Office							
7.00 10.1011111								
10:10-10:55AM	Looking for Opportunities in Real Estate through First Trust Deeds – Arcadia Ballroom							
	Moderator, Martin Griffiths, KPMG							
	Alim Kassam, Rama Capital Parti							
	Richard Katz, Westridge Lending							
10·55-11·30AM	Paul Rahimian, Parkview Financi The Fixed Income "Road Map" of							
10.00 11.00/11/1	Mike Salvay, Payden & Rygel	12010 Mean Daniooni						
	Doug Baker, Nuveen Investments							
11:30-12:00PM	The Future of Direct Investing as	s a Family Office – Arcadia Ballroom						
	David Nazarian, Nimes Capital							
	Nitin Chexal, Nimes Capital							
	Randy Winograd, Nimes Capital Jeff Kovick, Nimes Capital							
12:00-12:10PM	A Special Presentation – Arcadia	Ballroom						
	Tristan Layton, Dream Foundation							
12:10-1:30PM	Lunch (Open Networking) – Ocean & Vine Restaurant							
	Walk back to Sessions – Arcadia Ballroom							
1:40-2:00PM		Why it Matters – Arcadia Ballroom						
2.00 2.40PM	Gina Sanchez, Chantico Global, LLC							
2.00-2.401 101	-2:40PM Sports Panel – Creating Your Legacy – <i>Arcadia Ballroom</i> Steve Sax, former player for Dodgers, Steve Sax Enterprises, LLC							
	1 ,	gers, Father and Son Baseball Founda	tion					
2:40-3:10PM	:40-3:10PM Featured Speaker— Arcadia Ballroom The 2016 Election and the Investment Implications							
2.10 2.1EDM	Greg Valliere, Horizon Investments 5PM Walk to Break-Out Session #1 – Palisades Ballroom							
5:10-5:15FW	Break-Out Session #1 – I	чинящея Бингоот						
3:15-3:55PM	Track A	Track B	Track C	Track D				
				Accessing Higher Yielding, Liquid,				
	The Urgent Need for Changes in the Food Supply System	Opportunities in Energy: Falling Knife or Trade of the Year?	of Inefficiencies in Commercial Real	Current Return Assets in Today's				
	,		Estate	Market				
2.EE 4.00DM	Urban Seed Walk to Break-Out Session #2 – 1	ALPS Portfolio Solutions	DJM Capital Partners, Inc.	HAS Capital, LLC				
3:33-4:001101	walk to break-Out Session #2 – I	чинзииев Бингоот						
	Break-Out Session 2							
4:00-4:40PM	Track A	Track B	Track C	Track D				
	The Future of Entertainment &	Investing in Marketplace Lending	Creating a Positive Impact through	The Compelling Opportunity in				
	Education	Assets	Investing in Early Stage Sustainable	Direct Corporate Lending				
			Ideas	•				
4.40 F.00DM	BrainRush	Echelon Asset Management	Enactus	Monroe Capital LLC & CAIS				
4:40-5:00PM		Exhibit Hall Networking Break – Arcadia Foyer Hosted by Encore Capital Management, Fairbanks Capital Management, Inc., First Trust Advisors, and Landmark Family Office						
5:00-5:30PM	Featured Speaker— Arcadia Ballroo	1 0	it, Inc., First Trust Advisors, and Landin	lark Family Office				
2122 01001111	The FBI on Wall Street							
	David A. Chaves, Federal Bureau of Investigation							
5:30-6:30PM Keynote Speaker – Arcadia Ballroom								
	Entertainment Pill Pallaces Factoria as							
6.3U 8.3UDM	Bill Bellamy, Entertainer Cocktail Reception – <i>Poolside</i>							
0.50-0.50F W	Cockian Reception - Footstate							

Registration Arcuita Sugars	Wednesday, March 2, 2016								
Gringouy P. Rushiner, Conference Chairman, Lido Cresulting, Inc. 809-84-8M Philanthropic Update 2010 Opportunities for Investment and Impact — Anadia Balloven Backers Franking Tiley Hill, Encevolent Vision Enochs, Terry Jorok Lame Philaget Londardian, Maria Gafffrethe Longstreet Phase One, Metit Elliot & Diane Allien 8-45-91-5M Philanthropic Update 2010 Opportunities for Investment and Impact — Anadia Balloven Maximizing the Leader Within Sever Son, Stew See Enceptiones, LLC 915-93-5M Alfernatives in the New Normal—Areata Balloven Maximizing the Leader Within Sever Son, Stew See Enterprises, LLC 915-93-5M Alfernatives in the New Normal—Areata Balloven 1009-101-5M Networking Break & Walk to Break-Out Session +1 — Areata Engre & Patients 8109-101-5M Networking Break & Walk to Break-Out Session +1 — Areata Engre & Patients 8109-101-5M Track A Track B Track B Track B Track C Track D Hedgefound Investing The \$40 Triflion Dollar Question 8109-101-101-101-101-101-101-101-101-101-	7:30-8:00AM	į v							
Alpasa Weighberger, Conference Director, Lido Consulting Inc. 800-846Ab. Middletate, Barlyke Tilley Hill, Remodent Vision Exactles, Levy Look. Tamer Project Fundation, Medic Califforth Lungstreet 845-915AM February Conference California State California State California State California Califor	7:55-8:00AM	Welcome and Opening Remarks – Arcadia Ballroom							
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Phase One. Meritt Elliot & Diane Allen 1									
Peatured Speaker - Arroule Bolleton Maximizing the Leader Within Steve Sax, Steve Sax, Enterprises, LLC 9.15-913-M Alternatives in the New Normal Arroule Bolleton 9.35-10.00 Brown, Track B Bolleton Broady, I Brown, Track B Brown Franklin Square Capital Partners 1081-10-15 Miles Peatured Speaker Arroule Bolleton Broady Brown Capital Partners 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Peatured Speaker Arroule Bolleton Alternatives in the New Normal 1081-10-15 Miles Miles Peatured Speaker Arroule Bolleton Alternatives Alterna									
Steve Sax, Steve Sax, Enterprises, LLC Alternatives in the New Normal Square Capital Partners	8:45-9:15AM	Featured Speaker – Arcadia Ballroom							
9.15-9.53AM Alternatives in the New Normal — Arcadia Ballmons Body I, Browe, Entablian Square Capital Partners 9.35-10-00AM Entrepreneur to Investor — Arcadia Ballmons Send Harman, Troy Capital Partners		· · · · · · · · · · · · · · · · · · ·							
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Networking Break & Walk to Break-Out Session 1	9:35-10:00AM								
Hosted by Encore Capital Management, Fairbanks Capital Management, Inc., First Trust Advisors, and Landmark Family Office		Josh Berman, Troy Capital Partners Networking Break & Walk to Break-Out Session #1 – Arcadia Foyer & Palisades Ballroom							
Break-Out Session 1 Track A	10:00-10:15AM								
Track A Track B Track C What to Do with the Family Business - The Taboo Family Conversation Polsinelli & Houlihan Lokey Rosen Capital Partners			, Fairbanks Capital Management, In	c., First Trust Advisors, and Landma	rk Family Office				
The \$40 Trillion Dollar Question The Renaissance Companies The Renaissance Companies The Renaissance Companies Track Interest Palisades Ballroom Walk to Break-Out Session \$2 - Palisades Ballroom Track A Track B A Framework for Constructing a Long Term Asset Allocation Lido Advisors, LLC Table Speaker - Arcadia Ballroom Table 21:49-11:49-2M Walk to Featured Speaker & Keynot Track S Track B A Framework for Constructing a Long Term Asset Allocation Lido Advisors, LLC Comunidad Realty Partners The 2016 Presidential Campaign and the Language of Economic Freedom Frank Luntz, CEO and Founder of Luntz Global Partners, Political and Messaging Strategist, and Contributor to CBS News and Fox News Lunch - Arcadia Ballroom Mark Ordesky, Court Five Productions Charles Segars, Segars Media Andre Johnson, Hydra Entertainment The Next Generation: Is Staying True to the Family Legacy and Wisdom Antonio Marquez, Commidad Realty Partners Nick Gross, STRZ Enterprises Travis Huff, Huff Intermational Rida Murad, Christina Development Sports Immortals - Sports Asset Investing in Uncertain Times - Arcadia Ballroom Andrew Kline, Park Lane									
The \$40 Trillion Dollar Question Franklin Square Capital Partners Polisinelli & Houlihan Lokey Rosen Capital Advisors, LLC	10:15-10:55AM	Track A	Track B						
The Renaissance Companies Pranklin Square Capital Partners Walk to Break-Out Session 2 11:00-11:40AM A Framework for Constructing a Long Term Asset Allocation Lido Advisors, LLC Niche Real Estate Investment Pharmaceuticals Lido Advisors, LLC Comunidad Realty Partners Walk to Featured Speaker & Keynote Presentation 11:40-11:45AM The 2016 Presidential Campaign and the Language of Economic Freedom Frank Luntz, CEO and Founder of Luntz Global Partners, Political and Messaging Strategist, and Contributor to CBS News and Fox News Lunch — Arcadia Ballroom 11:40-2:00PM Mark Ordesky, Court Five Productions Charles Segars, Segars Media — Andre Johnson, Hydra Entertainment Andre Johnson, Hydra Entertainment Nick Gross, STRZ Enterprises Travis Huff, Huff International Ridam Muracy Hune Partners Sports Immortals - Sports Asset Investing in Uncertain Times — Arcadia Ballroom Andrew Kline, Park Lane Conversation Polisinelli & Houlihan Lokey Rosen Capital Advisors, LLC Healthcare Panel: Treating Brain Cancer & You and Nanotechnology Omni Nano & Curtana Pharmaceuticals Healthcare Panel: Treating Brain Cancer & You and Nanotechnology Omni Nano & Curtana Pharmaceuticals Comminance & You and Nanotechnology Omni Nano & Curtana Pharmaceuticals Lido Consulting, Inc. Shark Tank — Fast Pitches Audience Votes by Live Polining App! Lido Consulting, Inc. Pharmaceuticals Pharmaceuticals Travis Lunch — Arcadia Ballroom The 2016 Presidential Campaign and the Language of Economic Freedom Frank Luntz, CEO and Founder of Luntz Global Partners, Political and Messaging Strategist, and Contributor to CBS News and Fox News Lunch — Arcadia Ballroom Mark Ordesky, Court Five Productions Charles Segars, Segars Media Andre Johnson, Hydra Entertainment Antonio Marquez, Comunidad Realty Partners Nick Gross, STRZ Enterprises Travis Huff, Huff International Ridaa Murad, Christina Development Sports Immortals - Sports Asset Investing in Uncertain Times — Arcadia Ballroom Andrew Kline, Park Lane				•					
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3:00-4:00PM Closing Reception – Arcadia Foyer	2:45-3:00PM								
	3:00-4:00PM	3:00-4:00PM Closing Reception – Arcadia Foyer							