

Monday, February 29, 20162:30-3:30PM **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 Whisperer™, 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

7:30-8:00AM	Registration – Arcadia Foyer			
	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			
	Pat Soldano, GenSpring Family Office			
8:15-8:45AM	Alternative Investments Panel – Arcadia Ballroom			
	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			
	Timothy Speiss, EisnerAmper LLP			
9:30-9:50AM	Behavioral Portfolio Management – Arcadia Ballroom			
	Professor C. Thomas Howard, PhD, AthenaInvest™			
9:50-10:10AM	Exhibit Hall Networking Break – Arcadia Foyer			
	Hosted by Encore Capital Management, Fairbanks Capital Management, Inc., First Trust Advisors, and Landmark Family Office			
10:10-10:55AM	Looking for Opportunities in Real Estate through First Trust Deeds – Arcadia Ballroom			
	Moderator, Martin Griffiths, KPMG Alim Kassam, Rama Capital Partners, LLC Richard Katz, Westridge Lending Fund, LP Paul Rahimian, Parkview Financial			
10:55-11:30AM	The Fixed Income “Road Map” of 2016 – Arcadia Ballroom			
	Mike Salvay, Payden & Rygel Doug Baker, Nuveen Investments			
11:30-12:00PM	The Future of Direct Investing as 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			
1:30-1:40PM	Walk back to Sessions – Arcadia Ballroom			
1:40-2:00PM	The Absence of Money Velocity: Why it Matters – Arcadia Ballroom			
	Gina Sanchez, Chantico Global, LLC			
2:00-2:40PM	Sports Panel – Creating Your Legacy – Arcadia Ballroom			
	Steve Sax, former player for Dodgers, Steve Sax Enterprises, LLC Tim Leary, former player for Dodgers, Father and Son Baseball Foundation			
2:40-3:10PM	Featured Speaker – Arcadia Ballroom			
	The 2016 Election and the Investment Implications Greg Valliere, Horizon Investments			
3:10-3:15PM	Walk to Break-Out Session #1 – Palisades Ballroom			
3:15-3:55PM	Break-Out Session 1			
	Track A	Track B	Track C	Track D
	The Urgent Need for Changes in the Food Supply System	Opportunities in Energy: Falling Knife or Trade of the Year?	Identifying and Taking Advantage of Inefficiencies in Commercial Real Estate	Accessing Higher Yielding, Liquid, Current Return Assets in Today’s Market
	Urban Seed	ALPS Portfolio Solutions	DJM Capital Partners, Inc.	HAS Capital, LLC
3:55-4:00PM	Walk to Break-Out Session #2 – Palisades Ballroom			
4:00-4:40PM	Break-Out Session 2			
	Track A	Track B	Track C	Track D
	The Future of Entertainment & Education	Investing in Marketplace Lending Assets	Creating a Positive Impact through Investing in Early Stage Sustainable Ideas	The Compelling Opportunity in Direct Corporate Lending
	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 Ballroom			
	The FBI on Wall Street David A. Chaves, Federal Bureau of Investigation			
5:30-6:30PM	Keynote Speaker – Arcadia Ballroom			
	Entertainment Bill Bellamy, Entertainer			
6:30-8:30PM	Cocktail Reception – Poolside			

At-A-Glance Agenda

Wednesday, March 2, 2016

7:30-8:00AM	Registration – Arcadia Foyer Breakfast – Arcadia Ballroom			
7:55-8:00AM	Welcome and Opening Remarks – Arcadia Ballroom Gregory P. Kushner, Conference Chairman, Lido Consulting, Inc. Alyssa Weinberger, Conference Director, Lido Consulting, Inc.			
8:00-8:45AM	Philanthropic Update: 2016 Opportunities for Investment and Impact – Arcadia Ballroom Moderator: Ranlyn Tilley Hill, Benevolent Vision Enactus, Terry Torok Tanner Project Foundation, Marlo Gottfurcht Longstreet Phase One, Meritt Elliott & Diane Allen			
8:45-9:15AM	Featured Speaker – Arcadia Ballroom Maximizing the Leader Within Steve Sax, Steve Sax Enterprises, LLC			
9:15-9:35AM	Alternatives in the New Normal – Arcadia Ballroom Brody J. Browe, Franklin Square Capital Partners			
9:35-10:00AM	Entrepreneur to Investor – Arcadia Ballroom Josh Berman, Troy Capital Partners			
10:00-10:15AM	Networking Break & Walk to Break-Out Session #1 – Arcadia Foyer & Palisades Ballroom Hosted by Encore Capital Management, Fairbanks Capital Management, Inc., First Trust Advisors, and Landmark Family Office			
Break-Out Session 1				
10:15-10:55AM	Track A The \$40 Trillion Dollar Question The Renaissance Companies	Track B Alternatives in the New Normal Franklin Square Capital Partners	Track C What to Do with the Family Business – The Taboo Family Conversation Polsinelli & Houlihan Lokey	Track D Hedgefund Investing – Managing Portfolios through Volatile Markets Rosen Capital Advisors, LLC
10:55-11:00AM	Walk to Break-Out Session #2 – Palisades Ballroom			
Break-Out Session 2				
11:00-11:40AM	Track A A Framework for Constructing a Long Term Asset Allocation Lido Advisors, LLC	Track B Niche Real Estate Investment Comunidad Realty Partners	Track C Healthcare Panel: Treating Brain Cancer & You and Nanotechnology Omni Nano & Curtana Pharmaceuticals	Track D Shark Tank – Fast Pitches Audience Votes by Live Polling App! Lido Consulting, Inc.
11:40-11:45AM	Walk to Featured Speaker & Keynote Presentation			
11:45-12:30PM	Featured Speaker – 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			
12:30-1:00PM	Lunch – Arcadia Ballroom			
1:00-2:00PM	Winning at the New Content Game – Arcadia Ballroom Mark Ordesky, Court Five Productions Charles Segars, Segars Media Andre Johnson, Hydra Entertainment			
2:00-2:45PM	The Next Generation: Is Staying True to the Family Legacy and Wisdom a Help or Hindrance? – Arcadia Ballroom Moderator: Dr. Carolyn Friend, Inheriting Wisdom Antonio Marquez, Comunidad Realty Partners Nick Gross, STRZ Enterprises Travis Huff, Huff International Ridaa Murad, Christina Development			
2:45-3:00PM	Sports Immortals - Sports Asset Investing in Uncertain Times – Arcadia Ballroom Andrew Kline, Park Lane			
3:00-4:00PM	Closing Reception – Arcadia Foyer			