

2:00 - 2:30PM **Family Office Registration** – *Arcadia Foyer*  
**Exhibit Hall Open** – *Arcadia Foyer*

2:30 - 4:00PM **Closed Door Family Office Roundtable** – *Palisades Ballroom*

**Roundtable Panel Members:**

- **Patricia M. Armstrong, Abbot Downing**
- **Dr. Carolyn Friend, Wealth Whisperer™, Inheriting Wisdom**
- **Gregory P. Kushner, Lido Consulting, Inc.**
- **Timothy Speiss, EisnerAmper LLP**
- **Preston Tsao, Metcircle Networking LLC**
- **Adam Rockefeller Growald**
- **Dr. James Weiner, Wealth Whisperer™, Inheriting Wisdom**

This is a closed-door meeting strictly for Families and Family Offices. Our popular and highly regarded Family Office round table session allows participants to share candidly their challenges and success stories. Our panel of seasoned Family Office experts are aware that the family members in attendance live in a complex world, challenging them to continually grow investments, master financial skills, as well as manage family dynamics. Strong communication is the key to working through this complexity. There are a variety of ways to communicate and to engage family members to move things forward with the aim of creating a high-performance family. During the meeting, real life examples and solutions will be discussed. In addition to families, next gen family members who belong to NEXUS, a group focused on social impact, will be present.

3:30 - 6:00PM **General Registration** – *Arcadia Foyer*

4:00 - 6:00PM **It's Just 5 Minutes (Speed Dating)** – *Arcadia Ballroom*

During this session, "It's Just Five Minutes" participants will learn about some of the interesting strategies that will be discussed during the conference. These one-on-one meetings are an informal way for participants to learn about potential strategies that family offices may consider as part of their overall asset allocation.

6:00 - 8:00PM **Cocktail Reception** – *Arcadia Foyer & Arcadia Ballroom*  
*Hosted by: Lido Consulting, Inc. & NEXUS*

8:00 - 8:30AM	<b>Registration</b> – <i>Arcadia Foyer</i> <b>Breakfast</b> – <i>Arcadia Ballroom</i>
8:15 - 8:20AM	<b>Welcome and Opening Remarks</b> – <i>Arcadia Ballroom</i> Gregory P. Kushner, Conference Chairman, CEO & Founder, Lido Consulting, Inc. Alyssa Weinberger, Conference Director, Senior Managing Director, Lido Consulting, Inc.
8:20 - 9:00AM	<b>New Directions in Family Offices/Potential Impact of the New Administration</b> – <i>Arcadia Ballroom</i> Gregory P. Kushner, Lido Advisors, LLC Preston Tsao, Metcircle Networking LLC Juan Meyer, GenSpring Family Office Charles Winn, Pathstone Federal Street
9:00 - 9:20AM	<b>2017 Tax, Investment &amp; Personal Wealth Considerations: 2017 White House and Congressional Initiatives – Understanding the Global Challenges &amp; Opportunities</b> - <i>Arcadia Ballroom</i> Timothy Speiss, EisnerAmper LLP
9:20 - 9:40AM	<b>Capitalizing on Inefficiencies Within the Commercial Real Estate Marketplace</b> – <i>Arcadia Ballroom</i> Cory Johnson, Pender Capital Zach Murphy, Pender Capital
9:40 - 10:00AM	<b>Exhibit Hall Networking Break</b> – <i>Arcadia Foyer</i> Hosted by: Chivaroli Premier Insurance Services, CHUBB®, Gurtin Municipal Bond Management, Lateral Investment Management, Sklar Kirsh LLP and SS&C
10:00 - 10:45AM	<b>Looking for Opportunities and Weighing Risk in Real Estate Through First Trust Deeds</b> – <i>Arcadia Ballroom</i> Moderated by: Maier Rosenberg, CohnReznick Blair Portigal, Artemis Realty Capital, LLC Richard Katz, Westridge Lending Fund, LLC Paul Rahimian, Parkview Financial
10:45 - 11:00AM	<b>Investing in the New Normal</b> – <i>Arcadia Ballroom</i> Brody J. Browe, FS Investments
11:00 - 11:20AM	<b>Prepare for Change: Commercial Real Estate Investing in 2017</b> – <i>Arcadia Ballroom</i> Kevin Kujawski, Menlo Equities
11:20 - 11:50AM	<b>Investing in Cannabis: Legalization &amp; The Opportunity</b> – <i>Arcadia Ballroom</i> Karan Wadhera, Casa Verde Capital, LLC
11:50 - 1:15PM	<b>Lunch</b> – <i>Ocean &amp; Vine Restaurant</i>
1:15 - 1:25PM	<b>Walk Back to Sessions</b> – <i>Arcadia Ballroom</i>
1:25 - 1:55PM	<b>Fixed Income Dealing with the Potential of Rising Interest Rates</b> - <i>Arcadia Ballroom</i> Michael Salvay, Payden & Rygel Ken Kencel, Churchill Asset Management
1:55 - 2:25PM	<b>Real Estate Investments</b> - <i>Arcadia Ballroom</i> Joseph Penner, Hill Street Realty Robert Champion, Champion Real Estate Company
2:25 - 3:05PM	<b>Featured Speaker</b> – <i>Arcadia Ballroom</i> <b>Truth and Consequences in Sports Journalism</b> Larry Merchant – <i>Former HBO Boxing Analyst</i>
3:05 - 3:10PM	<b>Walk to Break-Out Session #1</b> – <i>Palisades Ballroom</i>

3:10 - 3:50PM	<b>Break-Out Session #1</b>			
	<b>Track A</b>	<b>Track B</b>	<b>Track C</b>	<b>Track D</b>
	<b>The Fixed Income Allocation Dilemma</b>	<b>Investing in the New Normal</b>	<b>Quant Funds: Everything You've Always Wanted to Know but Were Afraid to Ask</b>	<b>Real Estate Investing with Hill Street Realty</b>
	<i>Collins Capital</i>	<i>FS Investments</i>	<i>Alambic Investment Management, L.P.</i>	<i>Hill Street Realty</i>
3:50 - 3:55PM	<b>Walk to Break-Out Session #2 – Palisades Ballroom</b>			
3:55 - 4:35PM	<b>Break-Out Session #2</b>			
	<b>Track A</b>	<b>Track B</b>	<b>Track C</b>	<b>Track D</b>
	<b>How Do Family Offices Source and Then Diligence Deals?</b>	<b>Emerging Market Debt – The New Paradigm</b>	<b>The Convergence of Philanthropy &amp; Impact Investing: How Innovation is the Key to Creating a Growing Economy</b>	<b>The Changing Face of Technology and its Impact on Commercial Real Estate Investments</b>
	<i>Polsinelli LLP</i>	<i>BlueBay Asset Management</i>	<i>Benefunder</i>	<i>Menlo Equities</i>
4:35 - 5:00PM	<b>Exhibit Hall Networking Break – Arcadia Foyer</b> Hosted by Chivaroli Premier Insurance Services, CHUBB®, Gurtin Municipal Bond Management, Lateral Investment Management, Sklar Kirsh LLP and SS&C			
5:00 - 5:30PM	<b>Aviation Investing: How it Generates Attractive Yield and Growth Opportunities for Family Offices – Arcadia Ballroom</b> Moderator: Larry Covert, Aero Capital Solutions Jason Barany, Aero Capital Solutions Robert Hicks, Capstar Partners			
5:30 - 6:30PM	<b>Featured Speaker – Arcadia Ballroom</b> <b>Climbing Back to the Top of the Mountain – One More Time</b> Bill Walton, NBA Legend & Basketball Analyst			
6:30 - 8:30PM	<b>Cocktail Reception – Poolside</b> <i>Hosted by: Aero Capital Solutions</i>			

## Wednesday, March 29, 2017

7:30 - 8:00AM	<b>Registration</b> – <i>Arcadia Foyer</i> <b>Breakfast</b> – <i>Arcadia Ballroom</i>			
7:55 - 8:00AM	<b>Welcome and Opening Remarks</b> – <i>Arcadia Ballroom</i> Gregory P. Kushner, Conference Chairman, Lido Consulting, Inc. Alyssa Weinberger, Conference Director, Lido Consulting, Inc.			
8:00 - 8:45AM	<b>Philanthropic Update: 2017 Opportunities for Investment and Impact</b> – <i>Arcadia Ballroom</i> Helene Belisle, Cure Arthritis Foundation Jay Banfield, Year Up Jennifer Howell, The Art of Elysium			
8:45 - 9:15AM	<b>Donating Complex Assets to Charity: Case Studies and Best Practices</b> – <i>Arcadia Ballroom</i> Amy Grossman, Fidelity Charitable			
9:15 - 9:45AM	<b>Featured Speaker</b> – <i>Arcadia Ballroom</i> <b>Managing Client Risk, Litigation and Fake News in the Age of the 24-Hour Global Media</b> David Silver, Silver Public Relations			
9:45 - 10:15AM	<b>Creating &amp; Preserving Multi-Generational Wealth – Lessons from 40 years of West LA Real Estate Investing</b> – <i>Arcadia Ballroom</i> Lawrence N. Taylor, Christina			
10:15 - 10:45AM	<b>What Every Family Office Needs to Know About Security</b> Moderated by: Tim Lappen, Jeffer Mangels Butler & Mitchell LLP Jeff Marquart, Gavin de Becker & Associates Paul Tanner, Lockton Insurance Brokers, LLC			
10:45 - 11:05AM	<b>Exhibit Hall Networking Break</b> – <i>Arcadia Foyer</i> Hosted by: Chivaroli Premier Insurance Services, CHUBB®, Gurtin Municipal Bond Management, Lateral Investment Management, Sklar Kirsh LLP and SS&C			
11:05 - 11:45AM	<b>Staying True to the Family Legacy and Wisdom: A Help or a Hindrance?</b> – <i>Arcadia Ballroom</i> Moderated by: Dr. Carolyn Friend, Inheriting Wisdom Adam Rockefeller Growald Kate LaFleur Justin Rockefeller			
11:45 - 12:30PM	<b>Featured Speaker</b> – <i>Arcadia Ballroom</i> <b>A Conversation with George Papaconstantinou, the Man Who Had the Hardest Job in Europe</b> Interviewed by: Gina Sanchez, Chantico Global			
12:30 - 12:35PM	<b>Walk to Break-Out Session</b>			
12:35 - 1:15PM	<b>Break-Out Session</b>			
	<b>Track A</b> <b>When It's Too Good to Be True: Identifying Fraudulent Investments in the New Age of Deregulation</b> <i>Kaplan Marino</i>	<b>Track B</b> <b>Empowering Family Offices with Leading FinTech</b> <i>Addepar</i>	<b>Track C</b> <b>Reviewing the Benefits and Risks in Asset-Based Lending</b> <i>Artemis Realty Capital, LLC &amp; Westridge Lending Fund, LLC</i>	<b>Track D</b> <b>Experts Speak to the Intricacies of Cannabis Commerce</b> <i>CannaAngels, LLC</i>
1:15 - 1:45PM	<b>Lunch</b> – <i>Arcadia Ballroom</i>			
1:45 - 2:15PM	<b>Best Financial Investment Ideas in the Trump Market</b> – <i>Arcadia Ballroom</i> Gregory P. Kushner, Lido Advisors, LLC and Jason Ozur, Lido Advisors, LLC			
2:15 - 3:15PM	<b>Featured Speaker</b> – <i>Arcadia Ballroom</i> <b>Behind the Scenes of the Trump Administration</b> Andy Dean, Former President of Donald Trump's Television Company (Trump Productions LLC) Interviewed by: Gregory P. Kushner, Lido Advisors, LLC			
3:15 - 4:15PM	<b>Closing Reception</b> – <i>Arcadia Foyer</i>			