Presented by Private Wealth

The Family Office *Today*

Directed by Arthur A. Bavelas and Russ Alan Prince

MAY 4, 2010 • NEW YORK, NY

Workshop Agenda

9:00 – 9:15	Introduction and Overview Arthur A. Bavelas
9:15 – 9:45	Creating Extreme Wealth Russ Alan Prince and Arthur A. Bavelas • Money Rules • A piece of the action
9:45 – 10:15	The Nature of Family Offices • Types of family offices • The orientation of family offices
10:15 – 10:30	Break
10:30 – 11:15	Family Office Panel Richard J. Flynn, RothsteinKass Keith Bloomfield, Forbes Family Trust
11:15 – 12:15	Investment Management Panel Zachary Karabell, River Twice Research Belinda Sneddon, U.S. Trust Family Office
12:15 –1:15	Lunch: Robert T. McGee Director of Macro Strategy & Research at U.S. Trust, Bank America Private Wealth Management
1:15 – 2:00	Advanced Planning Panel Daniel L. Daniels, Wiggin and Dana James D. Kaplan, KB Financial Partners
2:00 – 2:45	Banking Panel Richard Fisher and John Hotchkiss, Herald National Bank
2:45 – 3:00	Break
3:00 – 3:45	Lifestyle Management Services Panel Kathy Reilly, Lifestylist Marketing Dr. Miles J. Varn, PinnacleCare
3:45 – 4:15	The Future of Family Offices • The growth of specialty family offices • The development of unique services
4:15– 4:45	The Future of Family Offices Russ Alan Prince • The growth of specialty family offices • The development of unique services

Presenters

Arthur A. Bavelas is an internationally-known expert and leading "special situation" strategic advisor to the ultra-affluent and family offices. Arthur is widely published, with white papers and books focused on wealth creation, preservation and asset protection.
www.BavelasGroup.com

Russ Alan Prince is a leading authority on the private wealth universe and is extensively involved in developing and enhancing family offices on behalf of the wealthy.
www.RussAlanPrince.com

Format and Cost of the Workshop

The price for the workshop is $99 for Family Office Principals and Family Members • $495 for Advisors.

This workshop will use a highly interactive combination of presentations and discussion. In order to maximize the benefits of this teaching/learning approach, the workshop will be strictly limited

Payments, Cancellations and Refunds

Participants canceling up to four weeks before the workshop will be entitled to a full refund minus a 25% administrative fee. Given the small size of the workshop, there will be no refunds for cancellations made after this date.

Disclaimer

Events may change the relative emphasis given to each element of the program or necessitate an adjustment in the topics that are covered. In order to assure an appropriate participant mix, attendance at the workshop is at the sole discretion of the organizer.

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For more information about attending the seminar, please contact Steve Kimball at 732.450.8866 ext. 12 or skimball@pw-mag.com.

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Speaker Bios

Keith M. Bloomfield is President & CEO of Forbes Family Trust LLC. Prior to starting at Forbes Family Trust, Mr. Bloomfield worked as a Senior Managing Director and Corporate Counsel for Third Avenue Management LLC. Before joining Third Avenue, Mr. Bloomfield was a Senior Associate, for over eight years, at the law firm of Simpson, Thacher & Bartlett LLP, representing principals and financial advisors on domestic and international mergers and acquisitions and private equity investments.

Daniel L. Daniels is a partner in the Private Client Services Department of Wiggin and Dana and divides his time between the firm's Stamford and New York offices. Dan focuses his practice representing business owners, corporate executives and other wealthy individuals and their families. Dan has a particular interest in working with owners of family- and closely-held businesses. He worked for several years in his own family's third generation family business. He is a member of the Family Firm Institute and Attorneys for Family Held Enterprises, as well as Wiggin and Dana's Closely Held Business Practice Group.

Richard Fischer, SVP & Managing Director. With more than 20 years of banking experience, Richard (Ricky) Fischer is well versed in the corporate finance needs of our middle market clientele. Prior to joining Herald, Ricky spent six years with Merrill Lynch as Vice President and Senior Business Financial Advisor. At Merrill Ricky spent his time counseling business owners as to how they can effectively finance for any need their businesses may encounter. Prior to Merrill, Ricky was a Team Leader and Senior Vice President in charge of the Middle Market Commercial Lending team for BOA/Fleet's outer boroughs of New York City.

Richard Flynn is managing partner at the firm of Rothstein Kass, where he is Director of the Family Office Group.

John Hotchkiss, SVP & Managing Director. John joined Herald National Bank from Merrill Lynch. While at Merrill both he and teammate, Richard Fischer, spent six years developing the middle market commercial banking and investment management portfolio. In total, John is a 27 year veteran of the commercial banking industry. Having begun his career at Marine Midland, John ultimately spent 17 years at Fleet/Bank of America where he was an Executive Vice President and Division Head overseeing the bank's textile, apparel, healthcare and middle market commercial lending business for the outer boroughs of New York City.

James D. Kaplan, CLU, Principal. James Kaplan is the founder of KB Financial Partners and has been a financial advisor since graduating from Lehigh University in 1983. As President of the Group, Jim serves to develop the overall strategy and services of KB Financial Partners. Jim is a recognized expert in the area of sophisticated estate and investment planning and is a frequent speaker at industry meetings, law firms and investment banking firms, focusing on concepts of estate planning, investment planning and sophisticated uses of life insurance.

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Speaker Bios Continued

Zachary Karabell, President of River Twice Research, CNBC commentator. He is also a Senior Advisor for Business for Social Responsibility. Previously, he was Executive Vice President, Head of Marketing and Chief Economist at Fred Alger Management, a New York-based investment firm, and President of Fred Alger and Company, as well as Portfolio Manager of the China-US Growth Fund, which won both a Lipper Award for top performance and a 5-star designation from Morningstar. He was also Executive Vice President of Alger's Spectra Funds, a no-load family of mutual funds that launched the $30 million Spectra Green Fund, which was based on the idea that profit and sustainability are linked. At Alger, he oversaw the creation, launch and marketing of several funds, led corporate strategy for acquisitions, and represented the firm at public forums and in the media.

Robert T. McGee is Director of Macro Strategy & Research at U.S. Trust Bank America Private Wealth Management, where he serves on the Investment Strategy Committee. Prior to that he was Chief Economist at U.S. Trust. In his new capacity he manages a team that researches global economic trends and turns them into strategies for investment professionals and high net worth clients.

Kathy Reilly is the CEO and founder of Lifestylist Marketing, Kathy brings over 20 years of marketing and lifestyle business experience to the leadership of her firm. Kathy has had a distinguished career creating memorable lifestyle and experience programs for some of the most high profile corporations. Kathy gained her marketing know-how at American Express, where she spent a decade creating best customer loyalty strategies for the affluent and launching merchant strategies for emerging industries. She founded her firm in 2009 to address a specific void in the marketplace for a boutique, high engagement lifestyle management firm that catered exclusively to the high net worth client. Kathy speaks frequently on lifestyle issues in the ultra high net worth space and has authored white papers about the impact of concierge services in service organizations.

Belinda J. Sneddon is a Managing Director and the Group Executive for the U.S. Trust Family Office which is focused on meeting the complex and multi-generational planning, investment consulting, fiduciary and servicing needs of a small number of wealthy families. Prior to taking on this role, Ms. Sneddon was responsible for the development of specialized client solutions and business operations for the Family Office. Previous to joining the Family Office, Ms. Sneddon was the Advice Center Executive for Family Wealth Advisors. In this role, she focused on developing complex, customized analysis, investment consulting, and portfolio recommendations for clients. She has held various roles with Bank of America's Global Wealth and Investment Management division and has over 20 years of industry experience, 18 with U.S. Trust and related organizations.

Dr. Miles J. Varn is the Chief Medical Officer of PinnacleCare. He is responsible for bringing new medical advances to the attention of PinnacleCare and its growing number of Members and overseeing high standards for the company's PinnacleCare Advocate™ teams throughout the nation. Dr. Varn is the chief contact with the distinguished PinnacleCare Medical Advisory Board, as well as other leading medical specialists and medical centers worldwide.

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