



# 2017 FOA Spring Global Summit

Tamarack Country Club, Greenwich CT

Monday, April 24, 2017 for Families and SFOs only

05:00-07:00pm Welcome Reception  
 07:00-10:00pm Private Hosted Dinners for Member Families and SFOs only

Tuesday, April 25, 2017

08:00-08:45am Special Presentation & Breakfast

“Family Guidance, Governance, and Legacy: The Things That Help Wealth Transfer Succeed and Bind Families Together” by **Ken Eyster**, Family Office Services, Arthur Bell

08:45-09:00am Opening Remarks by Angelo Robles, Family Office Association

09:00-09:30am Opening Keynote

“What I Learned From the Worst Perpetrators of Fraud and How Families Can Spot Trouble” **Norb Vonnegut**, Author, Partner at Fiduciary Wealth Partners

09:30-10:00am Opening Keynote

“Grit: The Most Important Trait Determinant of Success” by **Drs. Cindy Puccio, Matthew Kelly & Stephen Rudin**, Individual U. LLC / Peak Year Inc.

10:00-11:00am Breakout Sessions

**Ballroom**  
 “Optimal SFO Investment via RIA Roll-Up Strategy, a Discussion” **Howard Cooper** interviews **Ed Baker**, Affiliated Wealth Advisors’ CEO

**Grill Room**  
 “Family Office Structuring Best Practices” by **John Elmes**, CFA, Executive Managing Director, Pathstone

**Boardroom**  
 “Cybersecurity and Family Offices” by **Jed Davis**, Day Pitney & **Jon Carroll**, Family Office Practice, EY

11:00-12:00am Breakout Sessions

**Ballroom**  
 “Smoking Guns and Hidden Skeletons: Lessons in Due Diligence” by **Sal Russo**, Partner & Head of Research and **Chris Burrows**, Partner, EMM

**Grill Room**  
 “Deconstructing Conflict in the Family and the Family Office” by **Blaire Trippe**, Author and **Randy Kaufman**, EMM

**Boardroom**  
 “Direct Investing: What, Why & How” Moderator: **Scott Kegler**, Family Office Practice Leader, Aon. Panelists: **James Solomon**, Ravina Capital Group, **Nick Smith**, Cordatus Capital, **Sebastian Jano**, DC Solar, **Howard Cooper**, SFO



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Tuesday, April 25, 2017, cont.

## 12:00-02:00pm Luncheon & Keynotes

“The Time Is Now: Achieving Total Portfolio Impact” by **Julie Shafer**, BNP Paribas and **Anna-Marie Wascher**, Founder & CEO, Flat World Partners

“Passive vs. Active, Quant vs. Fundamental: What Does the Future Hold for Investors?” **John Bailey**, Founder & CEO, Spruce Investment Advisors

## 02:00-03:00pm Breakout Sessions

**Grill Room**

**FOA Ignite. Three Entrepreneurs. Three Judges. One Winner!** Everquote, SolBe, Hillflint Hosted by **John Roland**, Partner, Link Ventures

**Boardroom**

“**Designing the Family Office Brand for a More Rewarding and Sustainable Family Experience**” by **Art Stewart**, Managing Director, Strategic Impact Partners

## 03:00-03:30pm Afternoon Break

## 03:30-04:15pm Breakout Sessions

**Grill Room**

“**Where Family Offices are Headed: Future. Leadership. Talent**” by **Jane Bierwirth**, Managing Director, RSR Partners, Discussion Led by **Angelo Robles**, FOA

**Boardroom**

“**Living Beyond 100**” by **Dr. Dan Carlin**, CEO, World Clinic

## 04:30-05:00pm Co-Closing Keynote: Ballroom

“Successful Succession: A Generational Retail Journey” by **Karim Fadel**, Founder & Principal, Unison Realty Partners

## 05:00-05:30pm Co-Closing Keynote: Ballroom

“Investing in Energy Infrastructure Now - What You Need to Know” by **Ronald J. Barone**, Senior Analyst, VE Capital Management LLC

## 05:30-07:00pm Closing Reception, Hosted by The Rohatyn Group

## 07:00-10:00pm Private Hosted Dinners for Member Families and SFOs Only

**Family Office Association**  
500 West Putnam Avenue, Suite 400  
Greenwich, CT 06830

**Tamarack Country Club**  
55 Locust Rd  
Greenwich, Connecticut 06831