

Family Office Outlook 2012 Agenda

January 18th

Sign up SFO

Sign up MFO

Sign up non Family Office (restricted less than 10 people)

On Wednesday January 18th we will host a seminar on the "2012 Family Office Outlook". This event is oriented towards persons in the Family Office industry working primarily for single family offices, Ultra High Net Worth Individuals as well as multi-family offices. We will spend a day reviewing trends in family offices with leading experts on the subject matter. This event is for people who presently run or are considering launching a Family Office. To get through security, you must register. The event starts at 8:00 a.m. and ends at 4:30 p.m. A reception will follow.

AGENDA

8:00 - 8:30 a.m. , breakfast

8:30 - 9:30 , Credit Outlook 2012

Azhar Quader, Director - IMC Financial Markets (Advisor Sunrise Family Office)
Chris Kane, Managing Partner - KSquared Investments

9:30 - 10:30 a.m. , New Alternatives - Alternative Investing

John Earl, Managing Director - Keystone National Group

10:30 - 10:45 a.m. , Break

10:45 - 11:30 p.m. , Global Real Estate Opportunities in 2012

Maxwell Drever, Founder and Chairman - Drever Family Capital (Drever Family Office)
Damon Hemmerdinger, Senior Vice President - ATCO Advisory (Family Office/Multi Family Platform)
David Puchi, Managing Partner - Baseline Investments
Don Bethe, Senior Managing Director - Kennedy Wilson

Moderator - Ralph Liu, Founder and CEO - Investors Ally

11:30 - 12:30 p.m. , Growth Investing

Robert Taylor, Partner - Centinela Partners
Tom Keck, Partner - StepStone Global
Bill Anderson, Founder & CEO - First Beverage (Former Topa Equities family office)

Moderator - Bill Weaver, Principal - Global Capital Markets

12:30 - 1:30 p.m. Lunch and Master Limited Partnerships

Bob Hellman, Managing Director and CEO - America Infrastructure MLP fund

1:30 - 2:30 p.m. , Non-Correlated Investment Topics

Fuller O'Connor, Managing Director - EJP Capital
Richard Selvala, Chief Executive Officer and Co-Founder - Harvest Volatility Management
Razmig Der-Tavitian, Associate - Wilshire Associates (MFO)
Moderator - Karen Landry, Director - Inflection Partners

2:30 - 3:20 p.m. , Portfolio Outlook for 2012

Michael Rosen, Principal and Chief Investment Officer -Angeles Investment Advisory (Pension and MFO Portfolio

Advisory)

Boris Adlam, Founder and CEO - KNZ Partners (Adlam Family Office)

Michael Battey, Founding Partner - Sanctuary Wealth Advisors

Moderator - JC Kane, CEO and Founder - Lighthouse Point Marketing

3:30 - 3:45 p.m. Break

3:45 - 4:30 p.m. , Constructing the 2012 Family Office

Tim Lappen, Founder & Chairman, Family Office Group - Jeffer Mangels Butler & Mitchell LLP

John Thomson, Managing Director - The Portiera Group

Robin Coady Smith, Founder - Privatus CIO Services

4:30 p.m. ,RECEPTION

Date: Wednesday, January 18th, 2011

Time: 8AM to 4:30 PM

Reception, administrative preceding presentation

Venue: There is no walk in Registration.

* Hotel Palomar

* 10740 Wilshire Blvd Los Angeles, CA 90024

Registration:

Sign up SFO

Sign up MFO

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