

2018 FAMILY OFFICE ASSOCIATION MIAMI RETREAT

Monday, January 29th

06:00–08:00pm Family Office Association Welcome
Reception hosted by Kaufman Rossin

Tuesday, January 30th

08:00–08:45am Continental Breakfast

08:00–08:45am Early Morning Pre-Family Office Association
Miami: Roundtable Session for Families and Single Family Offices

“Lessons From Finance Titans: Single Family Investment
Office Reimagined!” by Angelo Robles, Founder, Family Office
Association

09:00–09:15am Ballroom Family Office Association Miami Open
Comments: Angelo Robles, Family Office Association

09:15–10:00am Ballroom Open Keynote

“Global Leader in Private Markets Investment Services to
Sophisticated Investors: Private Markets Outlook 2018” by
Nayef Perry, Partner, Hamilton Lane

10:00–10:45am Ballroom “Best Practices in Private Equity Fund
and Co-Invest Selection” Moderated by Carl Roston, Partner,
Akerman, Featuring Steven Wacaster, PM, Warren Equity, Kirk
Konert, PM, AE Industrial & Robert O’Sullivan, PM, Comvest

10:45–11:15am Morning Break

11:15–12:00pm Track One Ballroom “Family Offices Discuss
Investing in Puerto Rico: Rebuilding the Caribbean” Moderated
by Chris Rae, Managing Director, Elevation Marketing Advisory,
Featuring Jose Vizcarrondo, CFA, CEO, Arellano Family Group
and Jacobo Ortiz, Single Family Office

11:15–12:00pm Track Two Breakout Room “FOA Deal Improv: Live
Analysis of a Real-Life Direct Private Equity Deal Submitted by
the Audience” by David McCombie, Founder, McCombie Group

12:00–12:45pm Track One Ballroom “New Developments in
Family Office Management Company Structures: What You
Need Know Based on Recent IRS Case and the New Tax Act
(It’s Game Changing)” by John Elmes, Partner, Pathstone

12:00–12:45pm Track Two Breakout Room “Building a Billion
Dollar Company in Israel” by Lior Prozor & Pasha Romanowski,
General Partners, Hanaco Ventures

12:45–02:30pm Ballroom Luncheon & Luncheon Keynote

“In the Trenches of the Real Economy: How Private Lenders
are Filling the Void Left by Banks” by Jim Kauffmann, Founder,
Bay Point Advisors

02:30–03:15pm Track One Ballroom “Cannabis: An Ocean of
Challenges & Opportunities” by Tad Henderson & Morgan
Paxhia, Managing Directors, Poseidon Investment Management

02:30–03:15pm Track Two Breakout Room “The World Leader in
Fund Administration You Can’t Improve What You Can’t Measure:
Tools to Better Manage Risk in Your Alternatives Portfolio” by
Gio Maso, CITCO

03:15–04:00pm Track One Ballroom “A Brave New World - How
the Tax Bill Impacts Your Personal Tax Planning in 2018” by Scott
Sambur, Partner, Seward & Kissel

03:15–04:00pm Track Two Breakout Room “Single Family Offices
Discussing Best Investment Themes in 2018” Moderated by
David Teten, Managing Partner, HOF Partners, Featuring Candice
Beaumont, L Investments (SFO), Rose Shoen, SFO and Sandro
Salsano, SFO

04:00–04:30 pm Afternoon Break

04:30–05:15 pm Closing Keynote: “Nature Abhors a Vacuum –
China Fills It!” by Jon Corzine

Mr. Corzine served the State of New Jersey as United States
Senator from 2001–2006 and as its 54th Governor from 2006–
2010. Jon S. Corzine is the founder, Chief Executive Officer and
Chief Investment Officer of JDC-JSC L.P., a global macro/event
driven hedge fund

05:15–06:45 pm Closing Reception hosted by Kaufman Rossin



FAMILY OFFICE
ASSOCIATION

Angelo Robles | angelo@familyofficeassociation.com | Direct Line: (203) 570-2898

Hosted at the Conference Space of Ackerman
Three Brickell City Centre, 98 SE 7th St, Miami FL 33131