

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,
Michael Greene, 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, Founder, Elevation Partners, Featuring Jose
Vizcarrondo, Single Family Office, 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 TBD

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

“In the Trenches of the Real Economy” 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 “Structuring the Investing
Single Family Office: Do It Right or Suffer the Consequences”
Featuring Meir Grossman, 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: 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