

2018 Family Office Association Palo Alto Roundtable Symposium



Our Family Office Association Palo Alto Roundtable Symposium is limited to only 20 participants, this intimate symposium is dedicated to our research and resources on best practices and improving results in your single family office. It will be an extraordinary immersive intimate program with opportunities to share within an exclusive and highly private community.

Tuesday, January 16 | 9:00 am - 4:00 pm

08:30 – 09:00 am Continental Breakfast

09:00 – 09:15 am Family Office Association Palo Alto Roundtable Symposium Open Comments: Angelo Robles, Family Office Association

09:15 – 10:00 am “Roundtable Discussion: Wiring for Wisdom and More - Six Specific Transformational Neurocognitive Skills for Success, Happiness and Conquering the Shirtsleeves to Shirtsleeves Prophecy” Moderated by Angelo Robles, Family Office Association, Featuring Matthew Kelly Phd, Partner, Individual U & Peak Year

10:00 – 10:15 am Morning Break

10:15 – 11:00 am “Top Single Family Office Tech Consultant Discusses Trends and Resources Used by the World’s Most Tech Savvy Single Family Offices” Paul McKibbin, Family Office Practice, EY

11:00 – 11:15 am Late Morning Break

11:15 – 12:00 pm “Top 10 Ways to Derail Your Family Office” by Jim Coutre, Fidelity Family Office Services

12:00 – 01:15 pm Lunch & Luncheon Presentation: “Family Office Management Company Structures: What You Need Know Based on the New Tax Act” Moderated by Angelo Robles, Family Office Association, Featuring Julie Miraglia Kwon, McDermott Will & Emery LLP (Menlo Park) & Thomas P. Ward, McDermott Will & Emery LLP (Chicago)

01:15 – 02:00 pm “Single Family Office Shares Their Insights on the Endowment Model of Investing” by Marie Young, Single Family Office Executive

02:00 – 02:15 pm Afternoon Break

02:15 – 03:00 pm “Cyber Security Measures and Actions for Small and Large Single Family Offices” by Russell Greer, Founder, ControlKey

03:15 – 03:15 pm Late Afternoon Break

03:15 – 04:15 pm Closing Keynote Discussion
“Top Family Office Investor Shares What to Look for in Private Investments - Founders and CEOs in Particular” by Barry Uphoff, Capricorn

FAMILY OFFICE
ASSOCIATION

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