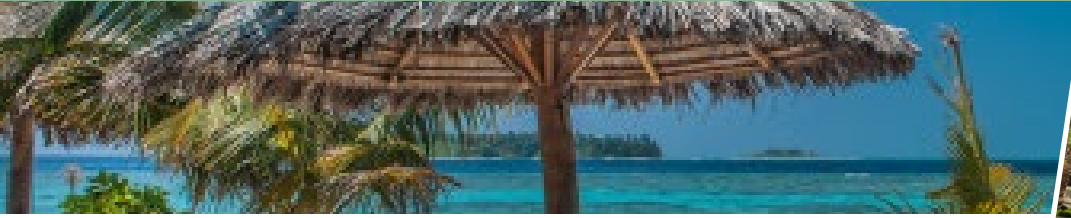


# 2018 FAMILY OFFICE ASSOCIATION PALM BEACH



## Friday, March 16th

**08:00–08:45am** Continental Breakfast

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

“Nuances of the New Tax Act: What Wealthy Families Need To Do Now!” by Julio Gonzalez, Founder, Engineered Tax Services

**09:00–09:15am** Family Office Association Palm Beach Open Comments: Angelo Robles, Family Office Association

**09:15–09:45am** Open Keynote

“Generationally Globalizing the Family Business AND Creating the Family Office: Juggling Both!” by Robin Tauck, Business Leader, Philanthropist and Single Family Office

**09:45–10:15am** “As the Art World Turns: Current Trends and Considerations for Families with Art Collections” by Von Sanborn, Partner, Day Pitney, Joanna Ostrem, SVP, Senior Director, Christies & Melissa Bernstein, SFO

**10:15–10:45am** Morning Break

**10:45–11:30pm Track One** “AI, Portfolio Theory & the Evolution of Early-Stage Venture” by Wissam Otaky & Dan Hoogterp, Partners, Hatcher+

**10:45–12:15pm Track Two Workshop** Family Office Technologies Demo Day: Three Cutting Edge Family Office Tech Companies. Moderated by Jon Carroll, EY, Featuring: Gio Maso, CTICO, Neill Reilly, SS&C & Nick Weaver, Addepar

**11:30–12:15pm Track One** “All Roads Lead to Emerging Markets” by Mark W. Yusko, Founder, CIO & CEO, Morgan Creek Capital Management, LLC

**12:15–01:30pm** Lunch

**01:30–02:00pm** Luncheon Keynote:

“The Evolution of Impact Investing: My Journey From the Gates Family and Their Foundation to Global Family Office Collaboration” by Trevor Neilson, Co-founder & CEO, i(x) Investments

**02:00–02:45pm Track One** “Everything is Changing: Macro Outlook of the US Real Estate Market” Moderated by Chris Rae, Featuring Karen Ward, Senior Managing Director, US Head of Real Estate Investment Banking, Ernst & Young Capital Advisors, LLC

**02:00–03:30pm Track Two Cyber Security Workshop, Two Presentations** “Dynamics, Threats and Opportunities in the Cyber Security Market AND Global Security Leader Discusses Managing Cyber Threats Specifically for Family Offices” Featuring Robert Ackerman, Founder, Allegis Capital & Allan Dunlavy, Partner, Schillings

**02:45–03:30pm Track One** “Merits of Structuring (and How) as an Investment Focused Virtual Family Office: The Time is Now!” by Thomas J. Handler, Chairman Family Office Practice, Handler & Thayer

**03:30–04:00 pm** Afternoon Break

**04:00–04:30pm Closing Keynote** “Capturing Alpha in LatAm: The Case for a Pure Play in Argentina” Andres Pitchon, Senior Investment Analyst, Highland Capital

**04:30–05:00pm Closing Keynote** “Single Family Offices Discuss Investment Trends” Moderated by Amanda Rodrigues, Forester Capital, Featuring Roman Khlupin, CIO, Strenta Investment Management (SFO) & Ryan Ansin (SFO)

**05:00–06:00 pm** Closing Reception

FAMILY OFFICE  
ASSOCIATION

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