



Advisor Workshop

2010 MFO & SFO Research Findings & Implications

Friday, January 14, 2011

8:00am – 12:00noon

Hosted by our Premier Partner

TriState Capital

The Union League of Philadelphia

140 South Broad Street

Philadelphia, PA 19102

Agenda

- 8:00 - 8:30am Registration, Continental Breakfast and Networking
- 8:30 - 9:30am 7th Annual Multifamily & 3rd Annual Single-Family Office Studies:
Research Findings
Tom Livergood, The Family Wealth Alliance
- 9:30 – 10:15am Trends in Banking
Chuck Fawcett, TriState Capital
Premier Partner of The Alliance's 3rd Annual SFO Study
- 10:15 – 10:30am Break
- 10:30 – 11:30am How Big Is It, Really? The Future of the Family Wealth Landscape,
and The Alliance Security Council
Tom Livergood, The Family Wealth Alliance
- 11:30 – 12:00noon Discussion, Thought-Sharing and Networking