



Advisor Workshop

MFO & SFO Research Findings & Implications

Thursday, January 27, 2011

8:00am – 12:00noon

Hosted by our Premier Partners

ACE Private Risk Services & HUB International Personal Insurance

ACE USA

33 Arch Street, Suite 2900

Boston, MA 02110

Red Sox Conference Room

Agenda

- 8:00 - 8:30am Registration, Continental Breakfast and Networking
- 8:30 - 9:15am 7th Annual Multifamily & 3rd Annual Single-Family Office Studies:
Research Findings
Tom Livergood, The Family Wealth Alliance
- 9:15 – 10:00am From Passion to Investment: Asset Protection Strategies for Collectors
Claudia Wetteland, ACE Private Risk Services
Premier Partner of The Alliance's 2010 MFO & SFO Studies
- 10:00 – 10:15am Break
- 10:15 – 11:00am Privacy Matters: Social Media Risks & Rewards
HUB International Personal Insurance
Premier Partner of The Alliance's 2010 MFO & SFO Studies
- 11:00 – 11:45am How Big Is It, Really? The Future of the Family Wealth Landscape
The Alliance Security Council
Tom Livergood, The Family Wealth Alliance
- 11:45 – 12:00noon Discussion, Thought-sharing and Networking