



# 3<sup>rd</sup> Annual SFO Study Unveiling New Pathways to the Future

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Tuesday, January 11, 2011

8:00 – 11:00 am

Hosted by Our Partners: TriState Capital and Pitcairn

The Dusquesne Club  
325 Sixth Avenue  
Pittsburgh, PA 15222

## Agenda

- 8:00 - 8:30 am      **Registration, Continental Breakfast and Networking**
- 8:30 - 9:00 am      **3<sup>rd</sup> Annual Single-Family Office Study: Research Findings**  
                            Tom Livergood, *The Family Wealth Alliance*
- 9:00 - 9:30 am      **Trends in Banking**  
                            Chuck Fawcett, *TriState Capital*  
                            Premier Partner of *The Alliance's 3<sup>rd</sup> Annual SFO Study*
- 9:30 - 10:00 am    **The Alliance's 2010 Research: Strategic Implications for Family Wealth**  
**The Alliance Security Council**  
                            Tom Livergood, *The Family Wealth Alliance*
- 10:00 - 10:45 am   **Setting the Course for Sustainability: Reimagining the Investment**  
**Function and Rationalizing the Family Wealth Structure**  
                            Collaborating Partner of *The Alliance's 3<sup>rd</sup> Annual SFO Study*  
                            Leslie Voth, Rebecca Meyer & Dain Kistner, *Pitcairn*
- 10:45 - 11:00 am   **Discussion, Thought-sharing and Networking**