



3rd Annual SFO Study Unveiling New Pathways to the Future

Thursday, January 13, 2011

8:00 am to 10:30 am

Hosted by Our Partners: Pitcairn & TriState Capital

The Union League of Philadelphia
140 South Broad Street
Philadelphia, PA 19102

Agenda

- 8:00 - 8:30 am **Registration, Continental Breakfast and Networking**
- 8:30 - 9:00 am **3rd Annual Single-Family Office Study: Research Findings**
Tom Livergood, The Family Wealth Alliance
- 9:00 - 9:45 am **Setting the Course for Sustainability: Reimagining the Investment Function and Rationalizing the Family Wealth Structure**
Leslie Voth, Rebecca Meyer & Dain Kistner, Pitcairn
Collaborating Partner of The Alliance's 3rd Annual SFO Study
- 9:45 - 10:15 am **The Alliance's 2010 Research: Strategic Implications for Family Wealth**
The Alliance Security Council
Tom Livergood, The Family Wealth Alliance
- 10:15 - 10:45 am **Trends in Banking**
Chuck Fawcett, TriState Capital
Premier Partner of The Alliance's 3rd Annual SFO Study
- 10:45- 11:00 am **Discussion, Thought-sharing and Networking**