



The
Family Wealth
Alliance
We Place Families FirstSM

SPRING EVENT *2011*

On Site Agenda

**Oak Brook Hills Resort
Oak Brook, Illinois**

May 18-20

AGENDA

Wednesday, May 18th

4:30 – 6:00 pm	Registration & Informal Networking
6:00 – 7:30 pm	Alliance Reception
7:30 pm	Premier Partner Dine-A-Rounds

Thursday, May 19th

7:30 – 8:30 am	Networking Breakfast
8:30 – 8:45 am	Welcome and Introduction Maitreyee Angelo, The Alliance
8:45 – 9:45 am	Results of the Inaugural External CIO Study Bob Casey, The Alliance
9:45- 10:15 am	Comparative Elements of MFO, SFO & Ext. CIO Research: Impetus and Implications Tom Livergood, The Alliance
10:15 – 10:30 am	Break
10:30 – 11:00 am	Premier Partner Presentation OppenheimerFunds
11:00 – 11:30 am	Launch of the Alliance Security Council Rick Higgins, Alliance Security Council
11:30 – 12:30 pm	Assigned Peer Breakout Groups
12:30 – 2:00 pm	Networking Lunch
2:00 – 2:30 pm	Premier Partner Presentation World Gold Council
2:30 – 3:30 pm	Security Council Expert Panel: Macro Threats Jim Ludes, American Security Project Bruce Spector, Pinnacle Care Moderated by Charles Lachman, Corporate Fuel Partners
3:30 – 4:00 pm	What's New at The Alliance The Alliance Team

AGENDA

Thursday, May 19th

- 4:00 – 4:15 pm Networking Break
- 4:15 – 5:15 pm Breakout Session: Select Your Table Topic
- 5:30 – 6:45 pm Alliance Reception
- 6:45 – 7:45 pm Special Panel Discussion: Working with the Media
Robert Jordan, WGN-TV
Kristen Oliveri, Private Asset Management
Jon Laing, Barron's
Moderated by Mary Rowland, Financial Writer
- 8:00 pm Alliance Dinner

Friday, May 20th

- 7:30 – 8:30 am Networking Breakfast
- 8:30 – 9:15 am External CIO Expert Panel Discussion
Susan McEvoy, Hirtle, Callaghan & Co.
Deirdre Nectow, Cambridge Associates
Moderated by Bob Casey, The Alliance
- 9:15 – 9:45 am Premier Partner Presentation
State Street Wealth Manager Services
- 9:45 – 10:00 am Special Film Presentation: Excerpts from “Excess Baggage”
Rick Higgins, Azertion Movement for Cultural Understanding
- 10:00 – 10:15 am Break
- 10:15 – 11:15 am Security Council Expert Panel: Micro Threats I
Michelle Jordan, Jordan LLC
Teresa Leigh, Teresa Leigh Household Risk Management
Paul Viollis, Risk Control Strategies
Moderated by Jim Kane, HUB International Personal Insurance
- 11:15 – 12:15 pm Security Council Expert Panel: Micro Threats II
Jane Borthwick, Ronald Varney Fine Arts Agents
Drew Mendoza, Family Business Consulting Group
Shoshana Bucholz-Miller, Arabella Philanthropic Advisors
Moderated by Tom Handler, Handler Thayer LLP
- 12:15 – 1:45 pm Networking Lunch & Closing Remarks



Copyright © 2011 Family Wealth Alliance, LLC. All rights reserved.