



We Place Education FirstSM

Fall 2011 Session Schedule

Held at the Stadium Classroom of Performance Trust

500 W. Madison Avenue, Suite 350 Chicago, IL 60661

Tuesday, November 1

Arrive and Check-in to Hotel

Wednesday, November 2

7:30 – 8:00 am

Breakfast

8:00 – 9:15 am

Welcome, Introductions, & the Family Wealth Landscape

9:15 – 9:30 am

Break

9:30 – 10:45 am

Estate Transfer & Fiduciary Management

10:45 – 11:00 am

Break

11:00 – 12:15pm

Tax Planning

12:15 – 1:45 pm

Lunch

1:45 – 3:00 pm

Integrated Financial Planning

3:00 – 3:30 pm

Break

3:30 – 4:30 pm

Peer Group Discussions I

4:30 – 5:00 pm

Introduction to the Case Study

5:00 – 6:30 pm

Case Study Team Assignments & Breakouts

7:00 – 8:30 pm

Dinner with Case Study Breakout Teams

Fall 2011 Session Schedule

Thursday, November 3

7:30 – 8:00 am	Breakfast
8:00 – 8:30 am	Debrief of Day 1
8:30 – 10:00 am	Risk Management
10:00 – 10:30 am	Break
10:30 – 12:00 noon	Portfolio Management
12:30 – 1:30 pm	Networking Lunch at Kiki's Bistro
1:30– 3:15 pm	Life Management (Field Trip)
3:15 – 3:45 pm	Break
3:45 – 5:00 pm	Family Communication & Governance
5:00 – 5:30 pm	Break
5:30 – 6:00 pm	Final Team Prep for Case Study Presentations
6:00 – 7:30 pm	Team Presentations of the Case Study
8:00 – 9:30 pm	Dinner Out

Fall 2011 Session Schedule

Friday, November 4

7:30 – 8:00 am	Breakfast
8:00 – 8:30 am	Debrief of Day 2
8:30 – 10:00 am	Technology & Reporting
10:00 – 10:30 am	Break
10:30 – 12:00 noon	Strategic Philanthropy
12:00 – 1:00 pm	Lunch
1:00 – 2:00 pm	Peer Group Discussions II
2:00 – 2:15 pm	Break
2:15 – 3:30 pm	Putting it All Together
3:30 – 4:30 pm	Pictures & Graduation Ceremony