



# Agenda

## Spring Workshop Series

### Navigating Rough Waters

Details of the 5<sup>th</sup> Annual MFO Study  
&  
Results of the Inaugural SFO Study

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**Wednesday, May 27, 2009**

**Hosted by: Pershing Advisor Solutions LLC**  
**The Bank of New York Mellon Corporation**  
101 Barclay, 10th Floor  
New York, NY 10286

## Agenda

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|----------------|---|
| 8:30 - 9:00 am | <b>Registration and Continental Breakfast</b>   |
| 9:00 - 11:00am | <b>Report of 5<sup>th</sup> Annual Multifamily Office Study &amp; Results of the Inaugural Single Family Office Study</b><br><br>Hear a frank and lively discussion on the top challenges of our day: Sustainability, Financial Markets Turmoil, and Human Capital. Learn about and discuss the following issues in this highly interactive session: <ul style="list-style-type: none"><li>➤ Overview of Both Study Results – The Challenges Ahead</li><li>➤ Why Scale Matters and Implications for Future Growth &amp; Ownership</li><li>➤ New Approaches to Family Education and Components</li><li>➤ Employee Data that Points to New Directions in Staffing</li><li>➤ How Executives are Approaching Risk</li><li>➤ Changes in Outlook, Investment Practices and Service Models</li><li>➤ Exploring the New Climate of Mergers and Acquisitions</li></ul> |
| 11:00 - Noon   | <b>White Paper Presentation</b><br><b>By Our Sponsoring Partner Host, Pershing Advisor Solutions</b>  |
| Noon - 1:00 pm | <b>Networking Buffet Lunch</b>  |
| 1:00 - 2:00 pm | <b>Trends, Implications, and Opportunities in Our New World Order</b>   |
| 2:00pm         | <b>Conclusions and Wrap-Up</b>  |