

FAMILY OFFICE ASSOCIATION
2014 SPRING GLOBAL SUMMIT
 WESTCHESTER COUNTRY CLUB - WEDNESDAY, 4/9 & THURSDAY, 4/10



DAY ONE

FOA Spring Global Summit Chairperson **Thomas J. Handler, J.D., P.C.**,
 Chairman, Advanced Planning & Family Office Practice Group, Handler Thayer, LLP

Morning Sessions on April 9th for SFOs/Families Only

	EARLY MORNING ROUNDTABLE SESSION #1	EARLY MORNING ROUNDTABLE SESSION #2
8:00am – 9:00am	<i>Early Pre-Summit Session with</i> Ted Neild , President & CIO, Gresham Capital Partners, discussion on Investing in Private Equity	<i>Early Pre-Summit Session with</i> Peter Williams , Founder & CEO, Ace Portal, discussion on Technology Portal for Direct Investments

8:00am – 9:00am
BREAKFAST

9:00am – 9:15am

FOA Spring Global Summit Welcome **Angelo Robles & Ryan Ansin**, Family Office Association

9:15am – 10:00am

Open Keynote: **Ambassador R. James Woolsey**
 Former Director of Central Intelligence Agency (1993-95)
 Chairman, Foundation for Defense of Democracies Venture Partner, Lux Capital

	TRACK 1 BILTMORE BALLROOM	TRACK 2 CARD ROOM
10:00am – 10:30am	<i>“Opportunistic Equity Investing in 2014”</i> Discussion led by: Dave Daglio , PM, The Boston Company	<i>“Managing Your Family’s Reputation Risk”</i> Discussion led by: Amber Melville-Brown , Partner, Withers

10:30am – 11:00am
MORNING BREAK

11:00am – 11:30am	<i>“Markets at a Crossroad: Where to Invest, Lurking Risks and How to Protect a Portfolio”</i> Discussion led by: John Bailey , Founder & President, Spruce	<i>“Flooding Congress With Talent”</i> Discussion led by: Rebecca Kantar & David Burnstein
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11:30am – 12Noon
LATE MORNING BREAK
BILTMORE BALLROOM

12Noon – 1:30pm

Luncheon Keynote: **Walter O’Brien**, Futurist & Founder, Scorpio
 TV Show Pilot title “Scorpion” for CBS network, Based on the True Stories of Walter O’Brien aka “Scorpion”, Walter is also Executive Producer. Produced by K&O (Transformers, Spiderman, Star Trek), Directed by Justin Lin (Fast & Furious 5 & 6.) Written by Nick Santora “Prison Break, Sopranos, Hostages”

“ConciergeUp.com - Intelligence on Demand for the Family Office”

1:30pm – 2:00pm	<i>“The Global Real Estate Landscape”</i> Featuring: Sam Arnold , CFA, Director & Portfolio Manager, Brookfield	<i>“Donor Advised Scientific Innovation A Family-Generated breakthrough in Cancer Research”</i> Discussion led by: Christian Bailey
2:00pm – 2:30pm	<i>“Portfolio Manager Town Hall Discussion”</i> Discussion led by: Angelo Robles , Family Office Association Featuring: TBD	<i>“Driving Change by Leveraging Consumer Demand”</i> Discussion led by: Meredith Ogilvie Thompson , Big Life Foundation

2:30pm – 3:00pm
BREAK

3:00pm – 3:30pm	<i>“Inventing Things that Enrich the Human Experience”</i> Early Afternoon Keynote Pablos Holman , Futurist, Inventor, Hacker, Intellectual Ventures Lab	<i>TBD</i> Discussion led by: TBD
3:30pm – 4:00pm		<i>TBD</i> Discussion led by: TBD

4:00pm – 4:15pm
LATE AFTERNOON BREAK
BILTMORE BALLROOM

4:15pm – 5:00pm

Late Afternoon Keynote: **Scott Harrison**, Founder & CEO, Charity Water

5:00pm – 5:45pm

Closing Keynote: **General Wesley Clark**, Retired four-star general, former NATO Supreme Allied Commander, former Presidential Candidate, West Point Valedictorian & Rhodes Scholar

5:15pm – 7:00pm

COCKTAIL RECEPTION

DAY TWO

FOA Spring Global Summit Chairperson **Thomas J. Handler**, J.D., P.C.,
Chairman, Advanced Planning & Family Office Practice Group, Handler Thayer, LLP

Early Morning Pre-Summit Roundtables on April 10th

	EARLY MORNING ROUNDTABLE SESSION #1	EARLY MORNING ROUNDTABLE SESSION #2
8:00am – 9:00am	Investment Discussion led by: Howard Cooper , Chairman, Cooper Family Office	Family Office Regulatory and Tax Discussion by: Thomas J. Handler , J.D., P.C., Chairman, Advanced Planning & Family Office Practice Group, Handler Thayer, LLP

8:00am – 9:00am

BREAKFAST

9:00am – 9:15am

FOA Spring Global Summit Welcome **Angelo Robles & Ryan Ansin**, Family Office Association

9:15am – 10:00am

Open Keynote: **David Rubinstein**

Co-Founder, Carlyle

Fireside chat led by: **Marc Stern**, Vice Chairman, Trust Company of the West

	TRACK 1 BILTMORE BALLROOM	TRACK 2 CARD ROOM
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10:00am – 10:30am	<i>“Interview With Leading Global Value Manger”</i> Discussion led by: Greg Coules , Founder & President, J.G. Coules & Co Featuring: Ken Shubin-Stein , Founder & CIO, Spencer Capital	10:15am – 11:00am <i>“Investing in Latin America: An Overview”</i> Discussion led by: Cate Ambrose , President & Executive Director, Latin American Private Equity & Venture Capital Association
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10:30am – 11:00am
MORNING BREAK

11:00am – 11:30am	<i>“Back to Roots as a Family Office: Concentrated Portfolio Construction”</i> Moderated by: Angelo Robles , Family Office Association, Featuring: Charles Lemonides , CFA, Portfolio Manager & Principal, ValueWorks	11:00am - 11:15am BREAK 11:15am – 12Noon <i>“Direct Impact Investments: Worth the Risk?”</i> Discussion led by: Temple Fennell
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11:30am - 12Noon	<i>“Challenging the Conventional Approach to Private Equity Investing”</i> Ted Neild , President & CIO, Gresham Capital Partners	
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BILTMORE BALLROOM

12Noon – 1:30pm

Luncheon Keynote: **David G. Neeleman**

Brazilian-American Entrepreneur, Founder of Three Airlines
Morris Air, JetBlue Airways and Azul Brazilian Airlines

1:30pm – 2:00pm	<i>“Navigating the Digital Family Office: The Intersection of Cyber Security, Investment Management and E-Commerce”</i> Featuring: Marc Halsema , Global Family Office Practice Leader, EY	TBD	Discussion led by: TBD
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2:00pm – 2:30pm	<i>Listen. Act. Learn. Repeat.</i> Early Afternoon Keynote Mari Kuraishi , Co-Founder & President, GlobalGiving	TBD	Discussion led by: TBD
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2:30pm – 3:00pm

AFTERNOON BREAK

3:00pm – 3:30pm	<i>“The Transformative World of High-Growth Early Stage Venture Startups and the Founders Who Build Them”</i> Featuring: Mike Rothenberg , Founder & CEO, Rothenberg Ventures	Weather Permitting Outdoor Networking and Putting Clinic	
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3:30pm – 4:00pm	<i>“Investing in the Future Earnings of Talented Young People”</i> Discussion led by: Greg Kahn , Partner, Day Pitney LLP Featuring: Oren Bass , Founder, PAVE		
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4:00pm – 4:30pm

LATE AFTERNOON BREAK

BILTMORE BALLROOM

4:30pm - 5:15pm

Closing Keynote: **Dan Pallotta**, Entrepreneur, Author, and Humanitarian Activist

“The Way We Think About Charity Is Dead Wrong”

5:15pm – 6:30pm

COCKTAIL RECEPTION