

Monday, March 16, 2015

3:30-4:30PM

**Family Office Registration** – *Catalina Foyer***Exhibit Hall Open** – *Arcadia Foyer*

4:30-6:30PM

**Private Family Office Roundtable** – *Venice***Roundtable led by Gregory P. Kushner, Founder & President, Lido Consulting, Inc.****Roundtable Panel Members****Timothy Speiss, Vice President, EisnerAmper LLP****Tim Lappen Founder & Chairman, The Family Office Group & The Luxury Home Group,****Jeffer Mangels Butler & Mitchell LLP / JMBM****Preston Tsao, Managing Member, Metcircle Networking LLC****Dr. James Weiner, Co-Founder, Wealth Whisperer™, Inheriting Wisdom****Dr. Carolyn Friend, Co-Founder, Wealth Whisperer™, Inheriting Wisdom****Linda Mack, President, Mack International, LLC****Paul Vogelgesang, Chief Risk Officer, Samueli Family Office**

This is a closed-door meeting strictly for the attendees from family offices. Our popular and highly regarded family office roundtable session will allow participants to share candidly amongst themselves, their challenges, and success stories. Our panel of seasoned experts in the area of Family Offices will share what they are currently seeing in their particular areas of expertise and will facilitate the open discussion with our audience of those issues of most concern along with the challenges facing family offices today. The discussions will cover three main areas of interest – Investing, Family Office Administration and Governance. For many, the desire to have impact as a family is as important for sustainability as dealing with the highly technical aspects such as investing and taxes. Our panel will discuss the challenge on how to balance both aspects as part of an offices' integrated planning.

5:30-6:30PM

**General Registration** – *Arcadia Foyer*

6:30-8:30PM

**Welcome Cocktail Reception** – *Arcadia Foyer***Hosted by EisnerAmper LLP**

7:30-8:00AM	<b>Registration</b> – <i>Arcadia Foyer</i>			
7:30-8:00AM	<b>Breakfast</b> – <i>Arcadia Ballroom</i>			
7:55-8:00AM	<b>Welcome and Opening Remarks</b>			
	Gregory P. Kushner, Conference Chairman, Chairman & Founder, Lido Consulting, Inc.			
	Alyssa Weinberger, Conference Director, Senior Managing Director/Director of Marketing, Lido Consulting, Inc.			
8:00-8:10AM	<b>Trends in the Family Office</b>			
	Gregory P. Kushner, Lido Consulting, Inc.			
	Preston Tsao, Metcircle Network LLC			
8:10-8:30AM	<b>Advantages Using A Managed Account Platform for Both Commodity and Alternative Strategies</b>			
	David Young, Galaxy Plus			
8:30-9:15AM	<b>Alternative Investment Panel Discussion</b>			
	Moderated by Marc Wolf, KPMG LLP			
	Ricardo L. Cortez, Broadmark Asset Management LLC			
	Bryan Wisk, Asymmetric Return Capital			
	Dovi Frances, SGVC			
9:15-9:35AM	<b>An Inefficiency in the Life Insurance Marketplace</b>			
	Aaron Hodari, Schechter Wealth			
	Scott Diamond, Schechter Wealth			
9:35-9:50AM	<b>Credit Strategies and Asset Based Lending: Have Your Cake and Eat it Too!</b>			
	Alim Kassam, Rama Capital Partners, LLC			
	Brian O’Shaughnessy, Rama Capital Partners, LLC			
9:50-10:35AM	<b>Real Estate Investment Outlook</b>			
	Joseph Penner, Hill Street Realty			
	Pat McDonald, Waypoint Residential, LLC			
	Peter Knell, KCB Management / KCB Real Estate			
10:35-10:55AM	<b>Exhibit Hall Networking Break</b>			
	<b>Hosted by AthenaInvest, Ceres Partners, Insperity and Winston &amp; Strawn LLP</b>			
10:55-11:40AM	<b>Family Office Panel Discussion</b>			
	Tim Lappen, Jeffer Mangels Butler & Mitchell LLP   JMBM			
	David Cohen, Karlin Real Estate			
	David Nazarian, Nimes Capital			
	Tony Pritzker, Pritzker Group			
11:40-12:00PM	<b>What’s Keeping Us Up at Night? What Are We Doing About It? A Macro Economics Discussion</b>			
	Dorothy Collins Weaver, Collins Capital Investments, LLC			
12:00-1:25PM	<b>Lunch (Open Networking)</b> – <i>Ocean &amp; Vine Restaurant</i>			
1:25-1:50 PM	<b>Concierge Intelligence - A Secure Think Tank for the Family Office</b>			
	Walter O’Brien, Scorpion Computer Services, Inc.			
1:50-2:05PM	<b>Risk Management in the Family Office</b>			
	Gregory P. Kushner, Lido Consulting, Inc.			
	Paul Vogelgesang, Samueli Family Office			
2:05-2:20PM	<b>The Cost of Liquidity</b>			
	Brody J. Browe, Franklin Square Capital Partners			
2:20-2:50PM	<b>Private Equity Panel &amp; M&amp;A Discussion</b>			
	Moderated by Vincent Calcagno, KPMG LLP			
	Randal Quarles, The Cynosure Group			
	Jeff Gehl, RCP Advisors, LLC			
2:50-2:55PM	<b>Walk to Break-Out Session #1</b>			
	<b>Break-Out Session 1</b>			
	<b>Track A</b>	<b>Track B</b>	<b>Track C</b>	<b>Track D</b>
2:55-3:35PM	<b>The Case for Real Assets and Farmland Investing</b>	<b>Opportunities Across Global Credit, Macro and Equity Markets</b>	<b>The Path to Energy Independence - Investment Opportunities from the US Energy Renaissance</b>	<b>A Review of the Multi-Family Market &amp; Investment Opportunities</b>
	Nuveen Investments	GoldenTree Asset Management, LP, BlueCrest Capital Management & CAIS	Alps Portfolio Solutions	Waypoint Residential, LLC
3:35-3:40PM	<b>Walk to Break-Out Session #2</b>			
	<b>Break-Out Session 2</b>			
	<b>Track A</b>	<b>Track B</b>	<b>Track C</b>	<b>Track D</b>
3:40-4:20PM	<b>Direct Private Equity Investments and Co-Investments – Why and How?</b>	<b>Building a Private Equity (like) Portfolio in the Public Markets: Generating Alpha Through Concentration</b>	<b>The Misunderstood Power of Changing Interest Rates</b>	<b>Allocating to Private Lending: Short-Duration, High Yield Fixed Income</b>
	Avalon Advisors, LLC & The Cynosure Group	Lazard Asset Management LLC	Ariel Investments	Direct Lending Investments, LLC & RealtyMogul.com
4:20-4:40PM	<b>Exhibit Hall Networking Break</b>			
	<b>Hosted by AthenaInvest, Ceres Partners, Insperity and Winston &amp; Strawn LLP</b>			
4:40-5:10PM	<b>The FBI on Wall Street</b>			
	David A. Chaves			
	Senior Special Agent, Securities Fraud Program Manager, Federal Bureau of Investigation, New York Division			
5:10-5:30PM	<b>2015 – Provocative Investment Ideas</b>			
	Joseph M. Hart, Vertical Capital Markets Group			
5:30-5:45PM	<b>Utilizing Technology to Work Smarter</b>			
	Jason Ozur, Lido Advisors, Inc.			
	Joy Hou, METIS Financial Network			
5:45-6:30PM	<b>Entertainment</b>			
	Jay Leno			
6:30-8:30PM	<b>Cocktail Reception</b> – <i>Poolside</i>			

7:30-8:00AM	<b>Registration</b> – <i>Arcadia Foyer</i> <b>Breakfast</b> – <i>Arcadia Ballroom</i>			
8:00-8:05AM	<b>Welcome and Opening Remarks</b>  Gregory P. Kushner, Conference Chairman, Chairman and Founder, Lido Consulting, Inc. Alyssa Weinberger, Conference Director, Senior Managing Director/Director of Marketing, Lido Consulting, Inc.			
8:05-8:35AM	<b>Philanthropic Update &amp; Succession Planning: Opportunities for Responsible Investors &amp; Their Advisors</b>  Gale A. “Morrie” Granger, PhD, Arthritis National Research Foundation (ANRF)  Larry Gilson, Focusing Philanthropy  Marc Pollick, The Giving Back Fund			
8:35-8:55AM	<b>Creating a Positive Impact on Youth and Communities</b>  Karch Kiraly, Three Time Gold Medal Olympian, Current Head Coach of World’s #1 Women’s National Volleyball Team			
8:55-9:25AM	<b>Visualizing and Understanding Systemic Risk</b>  Ren Y. Cheng, Fidelity Investments			
9:25-9:40AM	<b>How to Access and Complete Principal-to-Principal Real Estate Transactions</b>  Joy Hou, METIS Financial Network			
9:40-10:00AM	<b>Living with Deflation: Thoughts on the Next Twenty Years</b>  Gina Sanchez, Chantico Global, LLC			
10:00-10:15AM	<b>Networking Break &amp; Walk to Break-Out Session #1</b> <b>Hosted by AthenaInvest, Ceres Partners, Insperity and Winston &amp; Strawn LLP</b>			
	<b>Break-Out Session 1</b>			
10:15-10:55AM	<b>Track A</b>  <b>Next Gen Illiquid &amp; Liquid Strategies to Optimally Grow &amp; Preserve Wealth</b>  Checchi Capital Advisers & Comunidad Realty Partners	<b>Track B</b>  <b>Trust Deeds as an Alternative Asset Class</b>  Rama Capital Partners, LLC	<b>Track C</b>  <b>Due Diligence Best Practices for Private Equity Investors in the Middle Market</b>  RCP Advisors, LLC	<b>Track D</b>  <b>Alternative Credit: Access Income in Today’s Low-Yield Environment</b>  Franklin Square Capital Partners
10:55-11:00AM	<b>Walk to Break-Out Session #2</b>			
	<b>Break-Out Session 2</b>			
11:00-11:40AM	<b>Track A</b>  <b>Can You Afford to Have the Wrong Team?</b>  Fireman’s Fund Insurance Company & Marsh Private Client Services	<b>Track B</b>  <b>Introduction to Legal Cannabis Investing</b>  MJIC, Inc.	<b>Track C</b>  <b>The Future of Investment Management is Here – Are You Ready?</b>  ADDEPAR	<b>Track D</b>  <b>Building Portfolios with Consideration to Behavioral Impacts</b>  Vertical Capital Market Group
11:40-11:45AM	<b>Walk to Featured Speaker &amp; Keynote Presentation</b>			
11:45-12:30PM	<b>Keynote Speaker</b> – <i>Arcadia Ballroom</i>  J. B. Bernstein			
12:30-1:00PM	<b>Lunch</b> – <i>Arcadia Ballroom</i>			
1:00-2:00 PM	<b>Luncheon Speaker</b> – <i>Arcadia Ballroom</i>  General Keith B. Alexander, USA (Ret.)			