

Monday, February 26, 2018

1:30 pm	Family Office Roundtable Registration – <i>Arcadia Foyer</i>
2:00 pm – 4:00 pm	<p>Closed Door Family Office Roundtable – <i>Palisades Ballroom</i></p> <p>Roundtable Panel Members:</p> <ul style="list-style-type: none"> • Moderator - Tim Lappen, JMBM • Gregory P. Kushner, Lido Consulting, Inc. • Timothy Speiss, EisnerAmper LLP • Preston Tsao, Metcircle Networking LLC • Pat Soldano, Family Office Consultant • Kenneth M. Pressberg, SPB Partners LLC <p>This is a closed-door meeting strictly for Families and Family Offices. Our popular and highly regarded Family Office round table session allows participants to candidly share their challenges and their successes. The members of this panel of seasoned Family Office experts know that the family members in attendance live in a complex and challenging world. A world that continually asks them to grow investments, master financial skills, as well as manage family dynamics.</p>
3:30 pm	General Registration/Exhibit Hall Open – <i>Arcadia Foyer</i>
4:30 pm – 5:00 pm	<p>What Inning Are We in for the Commercial Real Estate Investment Cycle? – <i>Arcadia Ballroom</i></p> <p>Charles J. Schreiber Jr., KBS Realty Advisors</p>
5:00 pm – 6:00 pm	<p>It's Just 5 Minutes (Speed Dating) – <i>Arcadia Ballroom</i></p> <p>During this session, "It's Just Five Minutes" participants will learn an abundance of compelling strategies discussed during the conference. These "rotating-roundtable" meetings are an informal way for participants to learn potential strategies that family offices consider a part of their overall asset allocation.</p>
6:00 pm – 8:00 pm	<p>Cocktail Reception – <i>Arcadia Foyer / Ballroom</i></p> <p>Hosted by: Fidelity Investments Clearing and Custody Solutions</p>

Tuesday, February 27, 2018

7:45 am	<p>Registration – <i>Arcadia Foyer</i></p> <p>Breakfast – <i>Arcadia Ballroom</i></p>
8:20 am - 8:30 am	<p>Welcome and Opening Remarks – Arcadia Ballroom</p> <p>Gregory P. Kushner, Conference Chairman, CEO & Founder, Lido Consulting, Inc.</p> <p>Alyssa Weinberger, Conference Director, Senior Managing Director, Lido Consulting, Inc.</p>
8:30 am – 9:00 am	<p>Current Trends and Concerns for the Family Office – <i>Arcadia Ballroom</i></p> <p>Gregory P. Kushner, Conference Chairman, CEO & Founder, Lido Consulting, Inc.</p> <p>Preston Tsao, Metcircle Networking, LLC</p> <p>Jonathan Bren, Bren Ventures LLC</p>
9:00 am – 9:25 am	<p>2018 PE Outlook: Utilizing Private Equity as an Income Solution – <i>Arcadia Ballroom</i></p> <p><i>Brian Weisenberger, Ascendant Capital</i></p>
9:25 am – 9:45 am	<p>Seeking Value in Today’s Slowing Commercial Real Estate Market – <i>Arcadia Ballroom</i></p> <p>Kevin Kujawski, Menlo Equities</p> <p>Christopher Chang, Menlo Equities</p>
9:45 am – 10:05 am	<p>Exhibit Hall Networking Break – <i>Arcadia Foyer</i></p> <p>Hosted by: Chivaroli Premier Insurance Services, CHUBB®, Natixis Investment Managers, Post Advisory Group & Schwab Charitable</p>
10:05 – 10:50 am	<p>Opportunities in High Yield Private Lending Funds Through Bridge Financing – <i>Arcadia Ballroom</i></p> <p>Moderated by: Maier Rosenberg, CohnReznick LLP</p> <p>Richard Katz, Westridge Lending Fund, LLC</p> <p>Paul Rahimian, Parkview Financial</p> <p>Laus Abdo, Watt Funding</p>
10:50 am – 11:10 am	<p>Investment Considerations in Light of the 2017 Tax Cuts & Jobs Act – <i>Arcadia Ballroom</i></p> <p>Timothy Speiss, EisnerAmper LLC</p>
11:10 am – 11:25 am	<p>The Business Case for In-House Tech Innovation – <i>Arcadia Ballroom</i></p> <p>Michael Johnson, Gurtin Municipal Bond Management</p>

	Alan Trice, Gurtin Municipal Bond Management
11:25 am – 11:45 am	Independent Due Diligence of Alternative Investments – Arcadia Ballroom Bryan Mick, Mick Law P.C.
11:45am – 12:00 pm	Annual Charitable Grants Presentations – Arcadia Ballroom Gregory P. Kushner, Lido Consulting, Inc.
12:00 pm – 1:15 pm	Lunch – Ocean & Vine Restaurant <i>Hosted by: Torrey Pines Bank</i>
1:15 pm – 1:20 pm	Walk back to Sessions
1:20 pm – 1:40 pm	Evolution in Direct Investments – Arcadia Ballroom Daniel Cardella, KLR WellStream Asset Management, LLC
1:40pm – 1:55pm	State of the U.S. Cannabis Industry – Arcadia Ballroom Jim Carmack, MedMen
1:55pm – 2:45pm	Keynote Speaker – Arcadia Ballroom Tax reform: What Americans Really Want... Really Dr. Frank I. Luntz, Luntz Global Partners
2:45 pm – 2:50 pm	Walk to Break Out Sessions
2:50 pm – 3:30 pm	Break Out Session #1 – Palisades Ballroom Track A: Cannabis Opportunities NOW Sherri Haskell, CannaAngels, LLC Rehan Huda, Green Sky Labs Inc. Bill Kelly, AgriCascadia Track B: Biotechnology, MedTech, Digital Health - Successful Investing in the Life Sciences Moderator - Dina Lozofsky, Biocom Harry Nelson, Adaptive Health Capital Almir Naiberg, UCLA Technology Development Corporation Track C: Capitalizing on Opportunities in Commercial Real Estate through 1031 Exchanges Scott Brooks, Capview Partners, LLC Track D: Finding Value in the Minerals Market Elliot Karathanasis, Tregan Energy Partners, LP
3:30 pm – 3:35 pm	Walk to Break Out Session #2
3:35 pm – 4:15 pm	Break Out Session #2 – Palisades Ballroom Track A: Family Office FOMO (Fear of Missing Out) Dr. Carolyn Friend, Inheriting Wisdom

	<p>Alyssa Weinberger, Lido Consulting Inc</p> <p>Track B: <i>Seeking Value in Today's Slowing Commercial Real Estate Market</i></p> <p><i>Kevin Kujawski, Menlo Equities</i></p> <p><i>Christopher Chang, Menlo Equities</i></p> <p>Track C: Alpha, Blockchain and Crypto Assets</p> <p><i>Robert Breedlove, Parallax Digital</i></p> <p><i>Volkan Salar, Parallax Digital</i></p> <p>Track D: Private Placement Life Insurance – What is it and How it Can Offer Tax Efficiency in Your Portfolio</p> <p><i>Robert Kulle, Heritage Capital Strategies</i></p>
4:15 pm – 4:40 pm	<p>Exhibit Hall Networking Break – Arcadia Foyer</p> <p>Hosted by: Chivaroli Premier Insurance Services, CHUBB®, Natixis Investment Managers, Post Advisory Group & Schwab Charitable</p>
4:40 pm – 5:00 pm	<p>Experience, Core Values & Trusted, Long Term Personal Relationships: A Formula for Family Office Success – Even in Uncertain Times – Arcadia Ballroom</p> <p>Alexander A. Radosevic, Canon Business Properties, Inc.</p>
5:00 pm - 5:30 pm	<p>Pigs get fat, hogs get slaughtered. Are you a Pig or a Hog? Hedging Equities in Today's Market – Arcadia Ballroom</p> <p>Jason Ozur, Lido Advisors, LLC</p> <p>Jeff Garden, Lido Advisors, LLC</p>
5:30 pm – 6:30 pm	<p>Featured Keynote Speaker – Arcadia Ballroom</p> <p>Daymond John's 5 Shark Points: Fundamentals for Success in Business and Life</p> <p><i>Daymond John, Star of ABC's Shark Tank</i></p>
6:30 pm – 8:30 pm	<p>Cocktail Reception – Poolside</p> <p>Hosted by: <i>Gurtin Municipal Bond Management</i></p>

Wednesday, February 28, 2018

8:30 am	<p>Registration – <i>Arcadia Foyer</i></p> <p>Breakfast – <i>Arcadia Foyer Hallway</i></p> <p>Hosted By: USI Insurance Services</p>
8:55 am – 9:00 am	<p>Welcome & Opening Remarks – <i>Arcadia Ballroom</i></p> <p>Gregory P. Kushner, Conference Chairman, Lido Consulting, Inc.</p> <p>Alyssa Weinberger, Conference Director, Lido Consulting, Inc.</p>
9:00 am – 9:45 am	<p>Philanthropic Update: 2018 Opportunities for Investment and Impact – <i>Arcadia Ballroom</i></p> <p>Moderated By: Marc Pollick, The Giving Back Fund</p> <p>Mikaila, Me & the Bees & the Healthy Hive Foundation A <i>Time Magazine's</i> Teen Entrepreneur of the Year!</p> <p>Mikaila Ulmer, Me & The Bees Lemonade</p> <p>Zachary Quinn's Love Your Melon Doing Well by Doing Good!</p> <p>Zachary Quinn, Love Your Melon</p>
9:45 am – 10:15 am	<p>Introduction to Bitcoin – <i>Arcadia Ballroom</i></p> <p>Sonny Singh, BitPay</p>
10:15 am – 10:45 am	<p>Cannabis Cash Conundrum & Banking Cannabis – <i>Arcadia Ballroom</i></p> <p>Kendell Lang, Fusion Bank</p>
10:45 am – 11:05 am	<p>Exhibit Hall Networking Break – <i>Arcadia Foyer</i></p> <p>Hosted by: Chivaroli Premier Insurance Services, CHUBB®, Natixis Investment Managers, Post Advisory Group & Schwab Charitable</p>
11:05 am – 11:50 pm	<p>Keynote Speaker – <i>Arcadia Ballroom</i></p> <p>An Investment in Sports Is an Investment in Life</p> <p>Bill Plaschke, Award-Winning Sports Columnist, Los Angeles Times</p>
11:50 am – 12:20 pm	<p>Applying ESG/SRI Investing in the Current Environment – <i>Arcadia Ballroom</i></p> <p>Peter W. Beer, Payden & Rygel</p> <p>Chad Givens, Nuveen Investments</p>
12:20 pm – 12:25 pm	<p>Walk to Break-Out-Sessions</p>

12:25 pm – 1:05 pm	<p>Break-Out-Session – Palisades Ballroom</p> <p>Track A: Using Listed Private Equity to Access Smaller, Faster Growing Private Companies Jeremy Held, ALPS Portfolio Solutions</p> <p>Track B: Bridge Lending Opportunities and Challenges for 2018 <i>Gregg Bernstein, Westridge Lending Fund</i> <i>David Schwartz, Fort Amsterdam Capital</i></p> <p>Track C: Global Wealth Management Considerations <i>Eric Sanderson, Bank of the West Wealth Management's Family Wealth Advisors</i></p>
1:05 pm – 1:15	Walk to Arcadia Ballroom
1:15 pm – 2:10 pm	<p>Lunch – <i>Arcadia Ballroom</i></p> <p>Hosted By: USI Insurance Services</p> <p>Keynote Speaker</p> <p>Leadership Lessons from the Master – Ronald Reagan <i>Kenneth Adelman, Ambassador</i></p>
2:10 pm – 3:00 pm	<p>Keynote Speaker – <i>Arcadia Ballroom</i></p> <p>The Predictable Future of Tech and Unemployment Walter O'Brien, Founder of Scorpion Computer Services</p>
3:00 pm – 4:00pm	<p>The Looming Market Crash: Is this real life? Is this just fantasy? – <i>Arcadia Ballroom</i></p> <p>Gina Sanchez, Chantico Global, LLC</p>
4:00 pm – 5:00 pm	<p>Closing Reception – <i>Arcadia Foyer</i></p> <p>Hosted By: USI Insurance Services</p>