



8th Annual High Net Worth and Family Wealth Conference
Thursday, December 1, 2016
8:00 AM – 5:00 PM
Hub at Cira Center
2929 Arch Street
Philadelphia, PA

08:00 AM - 08:30 AM

- **Registration and Continental Breakfast**
 - **Attendees Choose a Track**
 - **Introductions (in the tracks)**
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08:30 AM - 9:20 AM

Track A: Will We See a Wave of Infrastructure Spending and, If So, How Will We Invest?

Moderator: Jeremy Tennenbaum, CFA, Altman Foundation

Panelists:

Howard Cure, Evercore

Isela Bahena, TIAA

Jodie Misiak, U.S. Department of Transportation

Track B: Changes Underway in the Single and Multi-Family Office Space

Moderator: Jamie McLaughlin, J.H. McLaughlin & Company

Panelists:

Liz Nesvold, Silver Lane

Rajini Kodialam, Focus Financial

Scott Gregorchuk, Forbes Family Trust

9:30 AM - 10:20 AM

Track A: Developments in Emerging Markets

Moderator: Jeremy Lehrer, CFA, Matthews Asia

Panelists:

Robert Horrocks, Matthews Asia

Andy Rothman, Matthews Asia

Track B: Women and Wealth: How the Industry Can Improve Its Service Delivery to Women Investors

Moderator: Lauren Foster, CFA, CFA Institute

Panelists:

Adrienne Penta, Brown Brothers Harriman
Jocelyn Wright, CFP, The American College
Mary Duke, Esq, Family Wealth Advisor
Christina M. Baltz, Withers Worldwide

10:20 AM – 10:40 AM

Break

10:40 AM - 11:30 AM

General Keynote Session:

Introduction: Jeremy Tennenbaum, CFA, Altman Foundation

Speaker: Will Goetzmann, Yale University, Author of “Money Changes Everything: How Finance Made Civilization Possible”

11:40 AM - 12:30 PM

Track A: Issues Facing Ultra High Net Worth Families When Investing Directly

Moderator: Joseph W. Reilly Jr.

Michael Black, CFA, Fidelity Family Office Services
Francois de Visscher, CPA, de Visscher & Co.
Claire Kendrick, Ph.D., Mill Creek

Track B: Current Trends in Family Philanthropy

Moderator: Arlin Green, Centura Capital

Panelists:

Jason Ingle, Closed Loop Capital
Richard Marker, Wise Philanthropy
Tim Wu, San Francisco Zoo
Mary Ann Stover, Foundation Source

12:30 PM - 2:00 PM

Lunch/Keynote Session

Introduction: Jeremy Tennenbaum, CFA, Altman Foundation

Speaker: Byron Wien, Vice Chairman, Blackstone

2:10 PM - 3:00 PM

Track A: Chief Investment Officer Panel

Moderator: Jeremy Bach, CFA, Bach Capital Advisors

Panelists:

Greg Curtis, Greycourt
Tom Chapin, CFA, Mill Creek
Eric Shelton, Toll Brothers

Track B: What Will They Take Away Next? Planning with a Smaller Tool Kit

Moderator: Jeffrey Lauterbach, Lauterbach & Co.

Panelists:

Domingo Such, Perkins Coie
Holly Isdale, Wealthaven
Robert Gordon, Twenty-First Securities
Jeff Brown, CFA, Parametric

3:00 PM - 3:10 PM

Break

3:10 PM - 4:00 PM

Track A: Should We Continue to Invest in Hedge Funds, or is it Time for a Different Approach?

Moderator: Tom Chapin, CFA Mill Creek

Preston McSwain, Fiduciary Wealth Partners
Mark Hoffman, CFA, Hawthorn
James McGrath, CFA, Forbes Family Trust

Track B: Working with the Emotional Investor: Psychology for Wealth Advisors

Introduction: Bruce Self, CFA, Hawthorn

Chris White, CFA, Hemenway Trust Company

4:00 PM - 5:00 PM

Reception – Refreshments and Lite Bites

[Click here](#) to register for the conference.

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