

Day 1 – Sunday December 4, 2016

10:00-11:45	Event Registration [Charleston Foyer]
11:45-12:45	Welcome Lunch [Veranda]
12:45-1:00	marcus evans Welcome Address [Charleston CD] Sandra Sasidharan , Executive Producer, marcus evans Chairperson's Opening Address Ryan Ponsford , Principal, Akili Capital
1:00-1:45	Keynote Presentation [Charleston CD] Flashpoint around the World–The Geo-Political Effect on Portfolio Management Steven Skancke , Chief Investment Officer, Keel Point Advisors
1:45-2:30	Presentation [Charleston CD] The Siren Song of Individual Business Deals–Practical Analytical Tools for Evaluating Investing Opportunities John Jennings , President, St Louis Trust Company
2:30-3:15	Service Providers Briefing [Charleston CD]
2:30-3:15	Networking Coffee Break [Charleston Foyer]
3:15-5:15	One-on-One Meetings [Charleston AB]
5:15-6:00	Masterclass [Charleston CD] Protecting Your Wealth against Systemic Risks–A Case for Precious Metals and Singapore Gregor Gregerson , Founder and Chief Executive Officer, Silver Bullion Pte Ltd
6:00-6:45	Presentation [Charleston CD] The Digital Impact of Technology in the World of Private Wealth Mitch Tanenbaum , Principal, Information Risk Strategy
Select	Interactive Roundtable Discussion [Charleston CD] U. S. Renewable Energy Investment Strategies Kumar Aiyer , Chief Executive Officer, Blue Flame Energy Finance LLC
6:45-7:30	Interactive Roundtable Discussion [Trails] Private Equity Investing for Families and Family Offices Sam Levine , Head of Private Equity, Roundtable Investment Partners LLC
7:30	Welcome Reception and Dinner [Veranda]

Day 2 – Monday December 5, 2016

7:00-8:00	Breakfast [Veranda]
8:00-8:45	Keynote Presentation [Charleston CD]

	<p>Global Investment Outlook: Where Are the Opportunities Now? R. McFall Lamm, Chief Investment Officer/ Chief Strategist, Stelac Advisory Services LLC</p>
8:45-9:30	<p>Presentation [Charleston CD] Digitizing Manual Family Office Operations – A Providence Family Office Case Study Jill Creager, Chief Executive Officer and Founder, Providence Family Office</p>
9:30-9:45	<p>Networking Coffee Break [Charleston Foyer]</p>
9:45-11:45	<p>One-on-One Meetings [Charleston AB]</p>
11:45-12:30	<p>Presentation [Charleston CD] Evolution of Family Leadership in Wealth Management Barton Parrott, Principal, Wealthbridge Partners</p>
12:30-1:30	<p>Networking Lunch [Veranda]</p>
1:30-2:30	<p>Panel Discussion [Charleston CD] Exploring the Recent Developments While Working with Cross Border Families Moderator: Nicole Taylor, Chief Executive Officer, Taylor Family Offices Rob Ragsdale, Partner, Balentine Stan Sung, Managing Director, GENRICH Family Office</p>
Select	<p>Presentation [Charleston CD] Is Volatility Reduction an Appropriate Risk Mitigation Practice? Thaddeus R. Shelly III, Chairman, Shelly & Associates and Investment Committee Member, Tiedemann Wealth Management LLC</p>
2:30-3:15	<p>Presentation [Trails] Working with the Trustee – An Understanding of the Framework Susan Hartley Moss, Managing Director, Fiduciary and Family Office, Wealthaven</p>
3:15-3:30	<p>Networking Coffee Break [Charleston Foyer]</p>
3:30-5:30	<p>One-on-One Meetings [Charleston AB]</p>
5:30-6:15	<p>Presentation [Charleston CD] Achieving Multi-Generational Success and Avoiding Failure for Families Gregory Curtis, Chairman and Founder, Greycourt Advisors</p>
6:15-7:00	<p>Debate [Charleston CD] Analyzing the Recent Trends on Active Investing versus Passive Investing Moderator: Steven Skancke, Chief Investment Officer, Keel Point Advisors Dorothy Weaver, Chairman and Chief Executive Officer, Collins Capital Investments LLC Todd Green, Chief Investment Officer, Alesco Advisors</p>
7:00-7:30	<p>Free Time</p>
7:30	<p>Evening Reception [Veranda] Join us for a cocktail dinner to maximize informal networking opportunities</p>



event-at-a-glance

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7:30-8:30	Breakfast [Veranda]
8:30-9:15	Keynote Presentation [Charleston CD] Investing with a Conscience: How Socially Responsible Investing Has Been Transmuted Chris Walters , Managing Director – Western Region, Genspring Family Offices
9:15-9:30	Networking Coffee Break [Charleston Foyer]
9:30-11:00	One-on-One Meetings [Charleston AB]
11:00-11:45	Presentation [Charleston CD] The Growing Popularity of Alternative Approaches to Investing, Such as Big Data and Factor Based Strategies Karim Ahamed , Partner, HPM Partners LLC
11:45- 12:30	Presentation [Charleston CD] Taking a Closer Look at the Investment Trends of Millennials in the Wealth Transfer Process Samantha Young , Senior Vice President, Private Client Advisor, U.S. Trust Bank of America Private Wealth Management
12:30-12:45	Chairperson's Closing Comments [Charleston CD] Ryan Ponsford , Principal, Akili Capital Prize Draw: Weekend for two at the Red Rock Resort & Spa Hand in your evaluation form to qualify!
12:45-1:45	Closing Networking Lunch [Veranda]