



Agenda

Advisor-Only Event

April 22-23, 2009
The James Hotel Chicago

Wednesday, April 22nd

- 5:30 – 7:00 pm **Cocktail Reception following day-long [CEO Roundtable](#)**
- 7:00 pm **Alliance Reception and Dinner**
Hosted by [The Family Wealth Alliance](#)

Thursday, April 23rd

- 7:30 – 8:30 am **Registration and Continental Breakfast**
- 8:30 – 8:45 am **Opening Remarks**
[Tom Livergood, The Family Wealth Alliance](#)
- 8:45 – 9:05 am **Sponsor Presentation I**
- 9:05 - 10:05 am **Inaugural 2009 Single-Family Office Study: Rough Waters Make Sustainability the Major Challenge for Families**
[Robert Casey, Senior Managing Director, The Family Wealth Alliance](#)
Hear the Findings and Key Questions Raised by this Groundbreaking Research
- 10:05 – 10:20 am **Break**
- 10:20– 11:20 am **Panel Discussion: Best Practices: Integrity – How Far Would You Bend?**
Moderator: [Tom Handler, Handler Thayer](#)
Panelists: [Jon Hunt of Convergent Capital Management](#), [Kathy Freeman of Kathy Freeman Company](#), and [Lee Weiss of Family Endowment Partners](#)
- 11:20 – 11:40 pm **Sponsor Presentation II**
- 11:40 – 1:00 pm **Networking Lunch & Report on The Alliance's New Initiatives**
- 1:00 – 2:00 pm **Panel Discussion: Ensuring Due Diligence in Assessing Risk Factors**
Moderator: [Brenda Sallstrom, Envoi](#)
Panelists: [Jim Kane of Hub Int'l Personal Insurance](#), [Michael Brink of Pelagos Advisors](#), and [Teresa Leigh of Teresa Leigh Household & Property Management](#)

2:00 – 2:20 pm	Sponsor Presentation III
2:20 – 3:30 pm	Breakout Sessions in the Round: The Ever-Popular Peer Group Discussions
3:30 – 3:45 pm	Break
3:45 – 4:45 pm	Panel Discussion: Multi-Dimensions of State-of-the-Art Client Reporting Moderator: Claudia Shilo, Ballentine Finn & Company Panelists: Marty Sullivan of State Street Corporation, Trent Witthoeft of Pershing Advisor Solutions, Jim Shehigian of WealthTouch, and Susan McDermott of Rokit Solutions
4:45– 5:00 pm	Debriefing of Four Discussion Topics of the CEO Roundtable
5:00 – 5:15 pm	Closing Remarks Tom Livergood, The Family Wealth Alliance