Private Wealth Management

For High Net Worth Individuals and Families

November 2-5, 2010

The cornerstones of successful wealth management are: management of the economic engine, control of costs, effective governance, and the expression and transfer of personal and family values. The course objective is to help participants to evaluate each of these cornerstones and to design a personalized family wealth strategy and its supporting infrastructure that they can implement.

Instructors

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Day 1	Tuesday, November 2, 2010				
7:30	-	8:15	A.M.	Continental Breakfast and Registration	Room 406
8:15	-	8:30	A.M.	Welcome and Introduction	Room 406
8:30	-	9:30	A.M.	**The Strategic Wealth Management Framework**	Lucas
9:30	-	10:00	A.M.	**Introduction of Course Participants**	
10:00	-	10:15	A.M.	Break	
10:15	-	12:30	P.M.	**Defining the Vision for Your Wealth Management Endeavors**	
10:15	-	11:00	A.M.	*Setting the Stage* Hamilton	
11:00	-	12:30	P.M.	*Breakout Session*	Hamilton, Lucas, Mihailidis Rooms 222, 226, 230
12:30	-	1:30	P.M.	Lunch	Lounge 420
1:30	-	3:00	P.M.	**Defining Your Financial Objectives**	Lucas
3:00	-	3:30	P.M.	Break	
3:30	-	5:00	P.M.	**Overview of Investment & Wealth Management Industries**	Lucas
5:15	-	6:00	P.M.	**Optional: Family Office Discussion**	Hamilton/Lucas-Room 406
6:00		9:00	P.M.	Reception and Dinner	Midway Club

Day 2 | Wednesday, November 3, 2010

8:00	-	8:30	A.M.	Continental Breakfast	Room 406
8:30	-	10:30	A.M.	**Investment Theory & Strategies: Alpha's, Beta's and Performance**	Heaton
10:30	-	10:45	A.M.	Break	
10:45	-	12:30	P.M.	**Hedge Funds: Do they hedge? How do they perform?**	Heaton
12:30	-	1:30	P.M.	Lunch	Lounge 420
1:30	-	3:00	P.M.	**Multi-Generational Estate Planning**	Helsinger-Room 406
3:00	-	3:15	P.M.	Break	
3:15	-	5:00	P.M.	**Concurrent Sessions**	
				▪ **Tax Factors for Individuals**	Helsinger-Room 406
				▪ **Breakout Discussion for International Participants**	Beck-Room 230
5:30	-	9:00	P.M.	Reception and Dinner	Robie House, architect Frank Lloyd Wright

Day 3 — Thursday, November 4, 2010

8:00	-	8:30	A.M.	Continental Breakfast	Room 406
8:30	-	10:00	A.M.	**Private Equity and Venture Capital (Part 1)**	Kaplan
10:00	-	10:30	A.M.	Break	
10:30	-	12:00	P.M.	**Private Equity and Venture Capital (Part 2)**	Kaplan
12:00	-	1:00	P.M.	Lunch	Lounge 420
				Optional: Investment Discussion	Lucas/Kaplan-Room 406
1:00	-	2:30	P.M.	**Investment Infrastructure and Reporting**	Lucas
2:30	-	3:00	P.M.	Break	
3:00	-	5:00	P.M.	**The Power of Giving Back** Moderated Session	Betsy Brill
5:00	-	6:00	P.M.	Reception (cash bar)	Lounge 420, 4th floor

Day 4	Friday, November 5, 2010				
8:00	-	8:30	A.M.	Continental Breakfast	Room 406
8:30	-	10:00	A.M.	**Family Legacy Planning**	Hamilton-Room 406
10:00	-	10:30	A.M.	Break	
10:30	-	12:30	P.M.	**Choosing Key Financial Advisors to Support the Family Eco-system**	Lucas/Hamilton
12:30	-	1:30	P.M.	Lunch	Lounge 420
1:30	-	3:00	P.M.	**Picking Your Investment Strategy**	Lucas
3:00	-	3:30	P.M.	Break	
3:30	-	4:30	P.M.	**Promoting Entrepreneurial Stewardship**	Lucas
4:30	-	4:45	P.M.	Closing Remarks	