

Third Annual Family Office Conference

Network with leading professionals and hear relevant, timely perspectives from renowned family office experts.

Tuesday, February 5, 2013

JPMorgan Chase Conference Center
New York City

**Gain insight on latest trends
with a focus on:**



- Economic, Tax and Planning Update—key drivers for markets and cutting-edge planning strategies
- Social Impact Philanthropy—how families are thinking about their philanthropic missions
- Alternative Asset Investing—why family offices have increased allocations

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Third Annual Family Office Conference

Network with leading professionals and hear relevant, timely perspectives from renowned family office experts.

Conference Program

7:45 a.m.–8:30 a.m.

Check-In, Continental Breakfast, and Networking

8:30 a.m.–8:40 a.m.

Welcoming Remarks and Introduction

Committee Chair

Susan R. Schoenfeld, CPA, JD, LL.M., MBA, Family Member Engagement, *W Family Office*

Conference Cochair

Madelyn R. Miller, CPA, MBA, Managing Director and Financial Advisor, *J.P. Morgan Securities*

8:40 a.m.–9:50 a.m.

Economic, Tax and Planning Update

Moderator:

Madelyn R. Miller, CPA, MBA, Managing Director and Financial Advisor, *J.P. Morgan Securities*

Panelists:

Scott A. Hodge, President, *Tax Foundation*

James F. O'Sullivan, Chief U.S. Economist, *High Frequency Economics*

Joshua S. Rubenstein, New York Comanaging Partner, National Chair of Trusts and Estates, *Katten Muchin Rosenman LLP*

Hear a leading thinker on tax policy from Washington answer the question: “Did America survive its Thelma and Louise drive off the Fiscal Cliff, and what does 2013 hold for tax policy in Washington?”

Next, a top U.S. economist will analyze the key macro drivers for financial markets in the year ahead.

And finally, a nationally recognized Trusts and Estates attorney will review an assortment of cutting-edge estate planning strategies in view of unprecedented tax, economic and political/social changes.

9:50 a.m.–11:00 a.m.

Family Philanthropy and Social Impact Investing

Moderator:

Mark B. Rubin, CPA, Senior Managing Director, Private Client Tax & Advisory Services Group, *FTI Consulting Inc.*

Panelists:

Doug Bauer, Executive Director, *The Clark Foundation*

Samantha L. Beinhacker, Philanthropy Advisor

As the field of philanthropy has evolved to become more focused on measuring the impact of financial investment, many families have adopted

similar approaches to their philanthropic work. We are privileged to have a panel with diverse philanthropic experience leading foundations and advising families.

The panel will share their work and their observations about how families are thinking about their philanthropic missions, as well as the evolution of measurement tools in assessing their philanthropic investments.

11:00 a.m.–11:15 a.m.

Break

11:15 a.m.–12:25 p.m.

Alternative Asset Investing in Family Offices

Moderator:

Wendy L. Craft, JD, Executive Vice President and General Counsel, *Fulcrum Equities, LLC*

Panelists:

Ira J. Perlmutter, Managing Director, *Triple Five Group*

Harold F. “Rick” Pitcairn II, CFA, Chief Investment Officer, *Pitcairn*

Henley Smith, Chief Investment Officer, Commonwealth Asset Management, *Gabelli Family Office*

The panel will look at the increase among family offices in alternative asset investing. The focus will be on why family offices have increased allocations to alternatives.

In addition, the panel will discuss the types of alternative investments the families are investing in, and take a look at the risks and benefits of coinvesting with other family offices.

12:25 p.m.–12:30 p.m.

Closing Remarks

Committee Chair

Susan R. Schoenfeld, CPA, JD, LL.M., MBA, Family Member Engagement, *W Family Office*

Agenda and speakers are subject to change. For the latest updates including speaker bios, visit www.nysscpa.org/familyoffice



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How to Register for the Conference:

Online at www.nysscpa.org/familyoffice

By phone at (212) 719-8383 or (800) 537-3635

Fill out the registration form on the back panel and mail back to us

Or Fax the registration form to (866) 495-1354

How to Register for the Live Webcast:

Online at www.nysscpa.org/familyoffice

By phone at (877) 880-1335

REGISTER FOR THIS CONFERENCE

Registration Information: All registrations must be received 14 days prior to the event in order to guarantee a seat and course materials. Allow approximately 14 days for your return confirmation. Registrants who do not receive their e-mailed confirmation before the conference must call FAE Registration to confirm registration status. Individuals who have not registered before the 14-day cutoff must call to determine space availability. Advance paid registrants will be seated first. For space availability and registration information, call FAE Registration during business hours.

Program Details: Check-in begins at 7:45 a.m., Tuesday, February 5, 2013. Program begins at 8:30 a.m. and ends at 12:30 p.m.

Payment Information: Payment may be made by check or may be charged to American Express, MasterCard, Visa, or Discover. Credit card information must accompany all fax, phone, and online registrations.

Special Requirements: Participants with special requirements should notify FAE staff at least 14 days in advance of the program.

Refunds: No refunds will be given for cancellations received less than 14 days prior to the program date. A \$50 processing fee will be deducted from refunds for cancellations received more than 14 days prior to the program date.

Transfers: FAE allows a registrant to transfer to another program or substitute another person without a penalty more than 14 days prior to the program date. Transfers and substitutions requested less than 14 days prior will be charged a \$25 processing fee. All transfers from an In-Person conference to its Live Webcast must be completed at least 1 business day before the scheduled conference date.

Walk-ins: All individuals who register on the day of the program will be charged an additional \$25 fee. As walk-ins, if the event is a FAE Paperless Event, please be advised that you will be e-mailed a link to the materials within five days after the program. Upon receipt of the link, please ensure that you download and save the course materials immediately. This link will expire 30 days after it is sent to you. **Materials will NOT be provided on-site.**

Late Registrants: All persons registering for a FAE Paperless Event after 2:00 p.m. the day before the event are considered late registrants. In order to provide the best service possible, a link to the program materials will be provided to you within five days after the program. Upon receipt of the link, please ensure that you download and save the course materials immediately. This link will expire 30 days after it is sent to you. **Materials will NOT be provided on-site.**

Mandatory Continuing Education Requirement: This program complies with the standards set forth by the New York State Education Department for mandatory continuing education for CPAs. FAE's New York State CPE sponsor number is 000372; New Jersey 20CE0002200; Pennsylvania PX177239.

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Third Annual Family Office Conference

Register Early!

This year's Conference is expected to sell out!

The Foundation for Accounting Education's half-day Family Office Conference, now in its third year, has become a must-attend event for professionals looking for guidance in making the most of the opportunities—and dealing with the challenges—surrounding family offices.

This unique conference, which sold out last year and is expected to sell out this year as well, provides a terrific opportunity to gain expert insight on how understanding latest developments can help build and maintain successful family offices.

Register early to ensure a seat at the in-person conference to fully take advantage of the networking opportunities among high-profile members from across the industry. If you are unable to attend in-person, or are closed out, you can still benefit from the valuable insight by registering for the live video webcast.

Who Should Attend? CPAs, attorneys, investment professionals, consultants, and family office management.

Why You Should Attend: This half-day conference will highlight the current opportunities and challenges faced by families who are contemplating, in the process of forming, or are currently maintaining family offices.

Program Details:

Time: 8:30 a.m.–12:30 p.m. (Check-in begins at 7:45 a.m.)

Sponsoring Committee: Family Office Committee, NYSSCPA

Sponsoring Committee Chair and Conference Cochair: Susan R. Schoenfeld, CPA, JD, LL.M., MBA, *W Family Office*

Conference Cochair: Madelyn R. Miller, CPA, MBA, Managing Director and Financial Advisor, *J.P. Morgan Securities*

Planning Committee: Jane Bernardini, Ann Burke, Wendy L. Craft, Madelyn R. Miller, Mark B. Rubin, Raymond G. Russolillo, Susan R. Schoenfeld, Philip Strassler, Paula Szturma, Carolyn M. Weiss, Evelyn Yanatos

Field of Study: Advisory Services

Recommended CPE Credit Hours: 4

Course Code: 25300311 (In-Person); 35300311 (Live Webcast)

Member Fee: \$200 (In-Person); \$150 (Live Webcast)

Nonmember Fee: \$250 (In-Person); \$200 (Live Webcast)



3 park avenue, at 34th street, new york, ny 10016-5991
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1-800-NYSSCPA

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Tuesday, February 5, 2013
JP Morgan Chase Conference Center

277 Park Avenue (between 47th and 48th Streets)
New York, NY 10016

Time: 8:00 a.m. – 12:30 p.m. (Check-in begins at 7:45 a.m.)
Course Code: 25300311 (In-Person); 35300311 (Live Webcast)

Mail this registration form along with payment information to:

Foundation for Accounting Education
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