Fifth Annual

Family Office Conference

CRITICAL INFORMATION FROM SOME OF THE MOST INFLUENTIAL FAMILY OFFICE PROFESSIONALS IN THE BUSINESS

5 Great Reasons to Register Now!

1. **Network with leading family office professionals, including Charlotte B. Beyer, wealth management trailblazer, Founder of IPI, and Author of *Wealth Management Unwrapped*:** After 20 years on Wall Street, **Charlotte B. Beyer** founded the Institute for Private Investors (IPI) in 1991, where she served as CEO until her retirement in 2012. She is considered a thought leader and creator of the Family Office industry.

   Our all-star line-up of wealth management professionals also includes **Lance Bylow,** Managing Director and Private Client Advisor at U.S. Trust, Bank of America Private Wealth Management; **Thomas J. Handler,** Managing Partner of Handler Thayer, LLP; and **Jillian Timmermans,** Partner and Vice President of the U.S. Compliance Consulting Team at Cordium.

2. **Conference Takeaways:** From learning about three unstoppable trends that will impact the wealth management business in the next 12 months, to knowing about government taxation, regulation, and the new rules for 2015 and beyond, you will come away with practical guidance to apply to your clients and family office.

3. **Networking:** Build your network of colleagues as you connect and establish relationships with presenters and conference attendees.

4. **Location:** Join us at the Citi Executive Conference Center, conveniently located in midtown at 153 East 53rd Street. Or, for your convenience, register for the Live Video Webcast if you can't join In-Person.

5. **CPE Credit:** Earn 4 CPE Credits in Advisory Services.

We look forward to meeting you on February 3 !

HOW TO REGISTER

- Online at www.nysscpa.org/familyoffice15
- By phone at (212) 719-8383 or (800) 537-3635

See nysscpa.org for registration policy

14 Wall Street, 19th Floor
New York, NY 10005
www.nysscpa.org
1-800-NYSSCPA

Fifth Annual

Family Office Conference

Tuesday, February 3, 2015
Citi Executive Conference Center
153 East 53rd Street, 15th Floor
New York, NY 10022
(also available via Live Webcast)

PROGRAM DETAILS:

Time: 8:00 a.m.–1:30 p.m.
Field of Study: Advisory Services
Recommended CPE Credit Hours: 4
Course Code: 25300511 (In-Person); 35300511 (Live Webcast)
Member Fee: $245 (In-Person, includes Networking Luncheon); $195 (Live Webcast)
Nonmember Fee: $310 (In-Person, includes Networking Luncheon); $260 (Live Webcast)

WHO SHOULD ATTEND?

Diverse professionals who work in or serve family offices and multifamily offices, including CPAs, attorneys, investment professionals, consultants, and family office management.

WHY YOU SHOULD ATTEND:

To learn about the current opportunities and challenges faced by families and their advisors who are contemplating, in the process of forming, or are currently maintaining family offices.

Visit nysscpa.org/familyoffice15 or call 800-537-3635 to register!

14-0169

FEBRUARY 3, 2015
Citi Executive Conference Center
New York City
(also available via Live Webcast)

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Meet

Charlotte B. Beyer,
Wealth Management Trailblazer, Founder of IPI, and Author of *Wealth Management Unwrapped*

Conference takeaways include:

- Avoid SEC registration compliance issues and filing triggers
- Discover the most effective methods of complete family office security
- Tackle fraud and due diligence issues, as well as investment options

Plus: Networking Luncheon, with a facilitated discussion on philanthropy

Thanks to our Sponsor GTM payroll services

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CPE Credit: 4

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TUESDAY, FEBRUARY 3, 2015 – PROGRAM

8:00–8:30 a.m. Good Morning!

Check-in, Continental Breakfast, and Networking

8:30–8:40 a.m. Welcoming Remarks

Committee and Conference Chair:
Philip F. Strassler, CPA, Founder and President, *Strassler, LLC;* Founder and Partner, *SFO Advisor Select LLC*

Madelyn R. Miller, Managing Director and Financial Advisor, *J.P. Morgan Securities*
Susan R. Schoenfeld, CPA, JD, LLM (Taxation), CEO and Founder, *Wealth Legacy Advisors LLC*

8:40–9:05 a.m. Trends in Family Offices: An Interview with Charlotte B. Beyer, Founder of IPI and Author of *Wealth Management Unwrapped*

Moderator:
Susan R. Schoenfeld, CPA, JD, LLM (Taxation), CEO and Founder, *Wealth Legacy Advisors LLC*

Hear from industry luminary Charlotte B. Beyer on current trends in family office, as she addresses the biggest threat to the single family office model and how our industry should respond; what the three unstoppable trends that will impact the wealth management business in the next 12 months are; and what power and love have to do with wealth management.

Find out more at www.nysscpa.org/familyoffice15

9:05–10:05 a.m. Structuring Your Family Office for Success: What Every Family Should Know About Government Taxation, Regulation, and the New Rules for 2015 and Beyond

Moderator:
Lance Bylow, CPA, Managing Director and Private Client Advisor, *U.S. Trust, Bank of America Private Wealth Management*

Panelists:
David Guin, Esq., Partner and N.Y. Office Managing Director, *Withers Bergman LLP*
Thomas J. Handler, JD, PC, Managing Partner, *Handler Thayer, LLP*
Jillian Timmermans, JD, Partner and Vice President, *Cordium*

Learn about the current regulatory environment for family offices, including tax regulation, the IRS's "Wealth Squad," and the U.S. Department of Labor. Know the trigger points for family office registration with the SEC and the Commodities Futures Trading Commission (CFTC), and the impact of regulation on current family office structures. Gain an understanding of ongoing family office compliance needs and best practices to address compliance with the CFTC, Dodd-Frank, the Foreign Account Tax Compliance Act (FATCA), the IRS, and PATRIOT Act regulations.

10:05–10:20 a.m. Break

10:20–11:20 a.m. Family Office Security in Today's Interconnected World

Christopher Falkenberg, JD, Founder and President, *Insite Security, Inc.*

Reduce the likelihood of becoming a target. Construct online and physical security with layers and clear stop-loss measures. Know the backgrounds of estate personnel and monitor their social media posts. Learn about best practices to protect family offices in a world of high-profile home invasions and cloud security breaches. Using a scenario-based approach, Mr. Falkenberg will illustrate the requirements for heightened employee due diligence, as well as appropriate measures aimed at protecting reputations and sensitive information, in order to address the growing concerns about family office security.

For Group Discounts, call 800-537-3635

11:20 a.m.–12:20 p.m. Family Office Direct Investments in Real Estate and Private Equity

Moderator:
E. David Smith, Esq., Attorney-Owner and Partner, *Smith & Associates*

Panelists:
Ira J. Perlmuter, Managing Director, *T5 Equity Partners, LLC*
V. Frank Pottow, Cofounder, *GCP Capital;* Managing Director, *GCP Capital Partners*
Belinda G. Schwartz, Esq., Partner and Chair, Real Estate Department, *Herrick, Feinstein LLP*

Follow the panel as it tackles areas including due diligence and fraud issues, how a family office decides to invest in RE and PE, internal advisor vs. outside manager, and fund of funds vs. direct investing.

12:20–1:30 p.m. Networking Luncheon

Carolyn M. Weiss, CPA, Controller and Assistant Treasurer, *The New York Community Trust*

Participate in facilitated table discussions about philanthropy, inspired by a TED Talk (Technology, Entertainment, Design) on the subject.
(Not available via Live Webcast.)

1:30 p.m. Closing Remarks

Committee and Conference Chair:
Philip F. Strassler, CPA, Founder and President, *Strassler, LLC;* Founder and Partner, *SFO Advisor Select LLC*

Madelyn R. Miller, Managing Director and Financial Advisor, *J.P. Morgan Securities*
Susan R. Schoenfeld, CPA, JD, LLM (Taxation), CEO and Founder, *Wealth Legacy Advisors LLC*

Agenda and speakers are subject to change. For the latest updates, including speaker bios, visit www.nysscpa.org/familyoffice15.

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