



INSTITUTE FOR
FAMILY GOVERNANCE
ANNUAL CONFERENCE 2017

STEP
ADVISING FAMILIES ACROSS GENERATIONS

GOVERNANCE: FROM STRATEGY TO EXECUTION
Integrating Consulting, Financial, & Legal Advice

EARLY BIRD DISCOUNT
\$525 for STEP/FFI members
\$665 for non-members

**THURSDAY
JAN 26, 2017**

**UNION LEAGUE CLUB
38 E 37TH ST, NYC**



PROGRAM CHAIR
Babetta von Albertini
(STEP/FFI)



PROGRAM VICE-CHAIR
John Oden
(STEP)



PROGRAM VICE-CHAIR
James Grubman
(STEP/FFI)

AGENDA

- 8:00 AM Registration & Breakfast
- 8:35 AM Welcome and Introduction of Vice-Chairs
- 8:45 AM **How to Navigate Cross-Cultural Complexities: Importance of Law, Culture and Wealth**
Dennis Jaffe, PhD, Wise Counsel Research
James Grubman, PhD, FamilyWealth Consulting
- 10:15 AM Break
- 10:30 AM **How to Give Power to Trust Beneficiaries**
Babetta von Albertini, PhD, Withers
- 11:15 AM **Should I Serve as a Director of Kingsland Private Trust Company? – What Every Director Needs to Know About Corporate and Fiduciary Liability**
Susan R. Schoenfeld, Wealth Legacy Advisors
Robin Rathmell, Kobre & Kim
John Oden, Alliance Bernstein (Moderator)
- 12:30 PM Lunch

- 1:00 PM **KEYNOTE: There is Little Less Trouble in Governing a Private Family Than a Whole Kingdom (*de Montaigne*)**
Barbara Hauser, Barbara R Hauser LLC
- 2:15 PM **Can Technology Help Increase Transparency, Family Communication, and Family Harmony?**
Justin Rockefeller, Addepar
Annarie Lyles, Lyles Family Enterprise
Edouard Thijssen, Trusted Family (Moderator)
- 3:15 PM **\$500M Family Windfall: What Next? Case Study on Why Family Office Governance and Performance Measurement Matter**
Doug Macauley, Cambridge Associates
Bill Boer, Grey Dunes Capital
Dave Albright, Northern Trust
Drew Mason, Jade Capital (Moderator)
- 4:30 PM Break
- 4:45 PM **KEYNOTE: Living Beyond Fukuyama's *End of History* – Does Governance Matter?**
Surprise Speaker
- 5:30 PM Closing Reception
hosted by the **Family Firm Institute**

To register, visit <http://tinyurl.com/IFGregistration>

FFI
FAMILY FIRM INSTITUTE