

Spring

# FOX Global Investment Forum™

FOR OWNERS OF INVESTMENT CAPITAL, BY OWNERS OF INVESTMENT CAPITAL

April 6, 2016 | The Harvard Club | New York, NY

## Guest Speakers



**Curt Fintel**

Director, Chief Investment Strategist  
CTC | myCFO



**Matthew Fleissig**

President  
Pathstone Federal Street



**Svetlana Loshakov, CFA**

Managing Director  
Moreland Management Company



**William McDonough**

Chief Executive  
McDonough Innovation



**Peter Pauley**

CEO and CIO  
Seven Valleys LLC



**Erik Schatzker**

Anchor and Editor-at-Large, Bloomberg  
Television, Host of "Market Makers"



**Darren Schuringa**

Founder and Chief Investment Officer  
Yorkville Capital Management, LLC

The **FOX Spring Global Investment Forum™** is a different kind of investment conference — it is for owners of investment capital, and CIOs working for owners of investment capital. Designed to engage the unique interests of family investment decision-makers and asset allocators, the topics are determined objectively and non-commercially to provide what the families want and need to hear. The conference is also intended to build a strong community among the investment oriented peers in attendance. Join us for world-class speakers and the opportunity to network with fellow leaders in the family office and investment world.

## Family Office Exchange Speakers

**Karen Clark, CFP®, TEP**

Managing Director,  
Leader of FOX Direct Investing Network

**Charles B. Grace, III**

Managing Director,  
Leader of FOX External Investment  
Strategies Network

**Sara Hamilton**

Founder and CEO

**Amy Hart Clyne**

Executive Director, Knowledge Center

**Alexandre Monnier**

President

**David Toth**

Director of Advisor Research,  
Leader of FOX Strategic CIO Council

All sessions will provide opportunity for interactive dialogue, questions and idea sharing.

7:15 am Breakfast and Registration

8:15 am Welcome

8:30 am **Macro Trends: The Stories Moving the Markets...How Technology is Transforming the Economy**

**Speaker:** Erik Schatzker, Anchor and Editor-at-Large, Bloomberg Television, Host of "Market Makers"

With nearly two decades of experience as a financial journalist in the U.S., Canada, Europe, South America and the Middle East, Erik Schatzker regularly speaks with Wall Street's most powerful executives and the top money managers from around the world. From interviews he has conducted with Lloyd Blankfein, CEO, Goldman Sachs; James Gorman, CEO, Morgan Stanley; Vikram Pandit, CEO, Citigroup; Larry Fink, BlackRock; private equity magnates Steve Schwarzman and David Rubenstein as well as fund managers Jim Chanos and George Soros and from his live reports from the World Economic Forum in Davos, Switzerland, Erik has gained unprecedented insight into the companies and stories moving the markets. Erik will share these insights while framing the key issues for discussion during the Spring Global Investment Forum.

9:30 am Morning Break and Refreshments



10:00 am **FOX Voice of the Wealth Owner™ Panel Discussion – Finding Alpha**

**Moderator:** Charles B. Grace III, Managing Director, Family Office Exchange

**Speakers:** Curt Fintel, Chief Investment Strategist, CTCmyCFO

Matthew Fleissig, President, Pathstone Federal Street

Svetlana Loshakov, CFA, Managing Director, Moreland Management Company

Peter Pauley, CEO, CIO, Seven Valleys LLC

Prevailing market conditions notwithstanding, this is a pivotal time for family office investors. A panel of Family Office and Advisory Firm CIO's will share the wealth owner's perspective in an interactive discussion geared toward articulating their current investment dilemmas...what they are doing to mitigate these challenges...and compelling insights about what lies ahead in the search for alpha.

11:30 am **Luncheon The Impact of Energy on Today's Markets**

**Speaker:** Darren Schuringa, Founder and Chief Investment Officer, Yorkville Capital Management, LLC

As FOX family members consider targeted exposure in specific industry sectors, one sector that members have urged us to explore at this forum is in the production or management of energy resources and the companies that service these industries.

Darren Schuringa is a globally recognized authority on investing in U.S. energy infrastructure through Master Limited Partnership (MLP) structures. Darren has a front row seat on innovative and first-to-market MLP investment solutions and the impact of energy on today's markets. He will address the supply and demand drivers for oil and gas as well as the impact of pricing on the U.S. and global economies while sharing insight into how to best invest in the energy sector.



**1:00 pm Peer Dialogue Break-Outs**

Among the many benefits of attending a Family Office Exchange Forum is the opportunity for small-group, high-level dialogue on key global investment topics with industry decision-makers. Every participant will be invited to attend a specific topic appropriate session or affinity community. To maintain the intimate nature of these conversations, the number of sessions offered and topics shared will be determined the day of the Forum.

Sessions will include, among others, the Direct Investing Network (DIN); the External Investment Strategies Network (EISN), and the Strategic CIO Council (SCIOC).



***Please note that some discussion groups will be limited to network members or council members only.***

**3:00 pm Afternoon Break and Refreshments**

**3:15 pm Investment Implications of the Next Industrial Revolution**

**Speaker:** William McDonough, Chief Executive, McDonough Innovation

Architect, designer, thought leader, and author William McDonough practices green architecture on a massive scale. In a 20-year project he is redesigning Ford's city-sized River Rouge truck plant and turning it into the Rust Belt's eco-poster child with the world's largest "living roof" for reclaiming storm runoff. He has created buildings that produce more energy and clean water than they use and as such is building the next generation of design on the site of the future of exploration: the NASA Sustainability Base. Currently, he is designing seven entirely new and entirely green cities in China. It is projects like these that earn him the distinction of being one of the 100 global disruptive innovators as designated by "The Purpose Economy" Imperative.

As chair of the Meta-Council on the Circular Economy, with his involvement in The World Economic Forum and through his Cradle to Cradle® design framework, William McDonough is pivotal in defining new opportunities to grow businesses amidst rising environmental concerns and volatility in natural resource supplies. Mr. McDonough will share insight into business models that allow business professionals to do "more with less" and the impact this philosophy has on bottom line profits and the investment implications of the next industrial revolution.

**4:15 pm Program Wrap Up and Key Takeaways**

**4:30 pm Cocktail Reception**

# FOX Spring Global Investment Forum™ Registration

April 6, 2016 | The Harvard Club | New York, NY



Registration for this event is limited to sophisticated investment decision-makers, including active investors, chief investment officers and asset allocators in single-family and multi-family offices. This event is open to members of the FOX Strategic CIO Council, Direct Investing Network, and External Investment Strategy Network, in addition to qualified FOX Members and non-members. All registrations are subject to approval by FOX.

## Please answer the following questions:

### What is your primary role within your family/firm's investment process?

- CIO
- Investment Committee Member
- CEO (or senior manager) with responsibilities over investments
- Other

### Are you a family member/wealth owner?

- Yes
- No

### If yes, what generation?

- Gen 1
- Gen 2
- Gen 3
- Gen 4
- Gen 5 (or greater)
- N/A

### What do you expect to be the top performing asset class / strategy over the next 12-36 months?

### What is your top investment concern?

### Do you collaborate regularly with other families as part of your investment program? How so?

- Share asset manager ideas
- Collaborate on investment due diligence
- Co-Invest in direct private equity
- Other

### Do you plan to attend the closing reception on Wednesday, April 6 at 4:30pm?

- Yes
- No

## Forum Location

### Harvard Club of New York City

35 West 44th Street, New York, NY 10036  
Phone: 1.212.840.6600

Forum attendees are responsible for their own hotel reservations. The following recommended hotels are within close walking distance to the Harvard Club.

The Algonquin Hotel | 212.840.6800 | [www.algonquinhotel.com](http://www.algonquinhotel.com)

The Iroquois Hotel | 212.840.3080 | [www.iroquoisny.com](http://www.iroquoisny.com)

Sofitel New York | 212.354.8844 | [www.sofitel-new-york.com](http://www.sofitel-new-york.com)

## Questions?

Contact us at [events@familyoffice.com](mailto:events@familyoffice.com) or call 312.327.1231

## Three Ways To Register

### 1. Scan and email to:

[events@familyoffice.com](mailto:events@familyoffice.com)

### 2. Fax this form to:

312.327.1212

### 3. Register online at:

<https://www.familyoffice.com/learning-events/forums/fox-spring-global-investment-forum-2016>

## Attendee Information

Name (First/Last)

Firm Name

Title/Position

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

E-mail

### Select One:

	FOX Member	Non-Member
2016 FOX Spring Global Investment Forum™	First Attendee <input type="checkbox"/> \$1,250	First Attendee <input type="checkbox"/> \$1,495
	Additional Attendee <input type="checkbox"/> \$1,050	Additional Attendee <input type="checkbox"/> \$1,295
	<input type="checkbox"/> Use Event Credit Included in FOX Membership Fee	

## Payment Method

Payment by check is enclosed. (Check payable in U.S. dollars to Family Office Exchange)

Please mail check to: **Family Office Exchange**  
**ATTN: Events**  
**100 South Wacker Drive, Suite 800**  
**Chicago, IL 60606**

Please charge the following credit card:  VISA  MasterCard  Am. Express

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Cardholder's Signature

**For event registrations, refunds of payments or forum allotments will be made if the cancellation is made in writing to Family Office Exchange at [events@familyoffice.com](mailto:events@familyoffice.com) five or more business days prior to the start of the event.**

**CPE**

Up to 2 CPE credits can be earned by attending this event. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures and acceptance may vary by state.