

Wednesday, May 1, 2019

Forum Materials may be found online at: www.familyoffice.com/WAF19
Wireless Internet Access: Network: Family19 Password: Exchange19

11:30 am **Registration Opens**.....Mosaic Foyer

12:00 pm **Networking Luncheon**.....Fortnight Ballroom

1:00 pm **Welcome**.....Mosaic Ballroom
Alexander Monnier, President, Family Office Exchange

1:50 pm **The Growing Power of Women Owners**.....Mosaic Ballroom
Deborah Jackson, Founder and Chief Executive Officer, Plum Alley Investments
Andrea Turner Moffitt, Author, "Harness the Power of the Purse: Winning Women Investors" and Co-Founder, Plum Alley Investments
Avril Westerman, Director of Investments, Westerman Interests, Inc. | Westerman Family Office

Women have become financial powerhouses exercising decision-making control over \$11.2 trillion of investible assets. Women investors from inheritors and spouses to wealth creators and wealth owners are taking a more significant role in managing their families investments in addition to their philanthropic endeavors. We are also in the midst of a significant demographic shift with dramatic growth of women wealth creators given the entrepreneurial nature of the rising generation. In fact, women are starting early stage technology and healthcare companies at the fastest pace in history. Many of these companies are looking to solve some of the greatest challenges we are facing as a society. With these forces at play, the wealth advisor industry has a huge opportunity to better serve women investors while also ensuring women business owners are positioned to succeed. Join us as we explore the opportunity to better serve women investors and hear directly from two women taking leadership roles within their family offices. We will also hear how they are considering investing in the future, having agency as an investor and advancing gender parity.

2:40 pm **Networking Break**

3:10 pm **Team-based Selling: How to Win More Business by Selling Together Effectively**.....Mosaic Ballroom
Michael Dalis, Author, "Sell Like a Team", Managing Partner, DRIVE Sales Consulting, LLC

Gone are the days of meeting a client for lunch, chatting about your offering, and closing the sale over dessert. Clients today look different from those of the past. They make networked purchasing decisions by committee, with diverse roles, interests, and backgrounds. With access to more information and a greater ability to share it, they demand value, access, and alignment from their counterparts. Sales is now a team sport, and to win you must build and manage selling squads that work in complete alignment – not just during client meetings, but before and after, as well. In this session, author Michael Dalis will guide us through the process of creating and managing selling squads that execute and win in every sales meeting or pitch. He'll offer a groundbreaking guide that will provide everything needed to create and organize selling squads that not only win, but win more frequently.

4:00 pm **Sparking Effective Communication and Interpersonal Skills**.....Mosaic Ballroom
Rebecca Bales, Global Partner, Lumina Learning USA

In this highly interactive and engaging professional development session, we will focus on communication and interpersonal skills that can be utilized to raise our self-awareness around behaviors and personality. By exploring these key skills, we will gain an understanding of how to better connect and interact with colleagues and clients.

Wednesday, May 1, 2019 *continued*

5:15 pm Adjourn

5:30 pm Networking Dinner Reception.....Terrace Room, 5th Floor

[• Agenda continues on next page •](#)

Thursday, May 2, 2019

7:45 am Registration.....Mosaic Foyer

Breakfast.....Fortnight Ballroom

9:00 am Welcome Back – Connecting the Dots.....Mosaic Ballroom

David Toth, Managing Director, Family Office Exchange

9:10 am Helping Families Navigate Opportunities and Risks in Uncertain Times..... Mosaic Ballroom

Sara Hamilton, Founder and Chief Executive Officer, Family Office Exchange

Vincent Hayes, Director of Member Development, Family Office Exchange

Major disruptions to the normal course of business are heading our way, and enterprise families will be uniquely challenged by unforeseen risks and opportunities. As trusted advisors to ultra-wealthy families and enterprises, our industry needs to understand how to have effective conversations to prepare clients for these looming disruptions. To address these challenges, FOX embarked on its 2019 Opportunities and Risk Study. In this session, join Sara Hamilton and Vince Hayes as they offer insights from the study, including how to help families organize risk and tools advisors can utilize to get smarter when engaging in important risk conversations with families.

10:00 am Preparing for the Global Talent Crunch.....Mosaic Ballroom

David Satler, Senior Client Partner, Korn Ferry

A major commercial crisis is coming, and it could cost nations and businesses \$8.5 trillion in unrealized revenue by 2030 – equivalent to the combined GDP of Germany and Japan. The threat: chronic skilled talent shortages. According to Korn Ferry, it will impact growth for businesses and nations as soon as 2020. By 2030, there will be a global talent shortage of 85.2 million skilled workers, with the knowledge-intensive financial services industry one of the hardest hit. In this session, we’ll examine what this means for the financial services industry, what advisor firms can do to prepare, and examples of what industry leaders have done to mitigate the threat.

10:50 am Networking Break

11:10 am Trends in Integrated Wealth Advisor Selection.....Mosaic Ballroom

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

Panelists: Wally Head, Vice Chairman, Gresham Partners, LLC

Drew McMorrow, President & Chief Executive Officer, Ballentine Partners

It’s no surprise that the integrated wealth advisory industry focused on ultra-high net worth families is highly competitive. This session will take a smart look at the selection process from the perspective of families and advisors. The discussion will cover trends in advisor selection as well as key elements driving the search process. What are families doing to identify the right advisors and what are they seeking? How are successful advisors attracting clients? Case studies and examples will be explored to derive lessons learned by advisors and families during this session.

12:10 pm Networking Luncheon..... Fortnight Ballroom

[• Agenda continues on next page •](#)

Thursday, May 2, 2019 *continued*

1:10 pm Peer Dialogue Sessions.....Mosaic Ballroom

Join your peers in high-level, face-to-face roundtable discussions about topics of most concern to wealth advisors. Each table will be focused on generating strategic conversations to share ideas and solutions for business decisions ahead.

2:10 pm Networking Break

2:25 pm Thematic Investing: Harnessing Artificial Intelligence and Data Science to Build the Portfolio of the Future.....Mosaic Ballroom

Hardeep Walia, Founder and Chief Executive Officer, Motif

The premise of thematic investing is seductively simple. Markets over the long-term are driven by earnings growth and thematic investing looks to identify long-term trends that are likely to drive disproportionate earnings growth in the future. Artificial intelligence, for example, isn't just about the next revolution of computing. It will change everything from how we communicate, to how we commute. An aging population isn't just going to inflate the health care industry. It will reshape everything from urbanization to unions. Figuring out how these trends play out in the global economy is a complex problem. In this cutting-edge talk, Hardeep Walia will explain how data science and A.I. can be used to uncover the most important trends driving the economy and quantify the companies with maximum exposure to these trends. He'll also demonstrate how dynamic thematic models can be created and implemented in a portfolio.

3:25 pm Closing Remarks

3:30 pm Adjourn