

**Tuesday, July 18, 2017**

9:00 am	Registration Opens .....	Lucerne Foyer
10:00 am	Optional Speed Networking .....	Alpine
11:00 am	Forum Welcome .....	Lucerne
11:10 am	Blockchain and Beyond: The Imminent Impact of Distributed Ledger Technology on the Family Office .....	Lucerne
12:00 pm	Luncheon and Technology Demonstrations: Solution Introductions .....	Lucerne
1:00 pm	Technology Demonstration Transition Break	
1:15 pm	<u>Technology Demonstrations</u> Session 1: 1:15 - 1:40 pm Session 2: 1:50 - 2:15 pm Session 3: 2:25 - 2:50 pm	
	Complex Interests .....	Bianco (3rd Floor)
	Dynamo Software .....	Rhone (3rd Floor)
	ETON Solutions .....	St. Moritz
	FundCount .....	Grindelwald
	Intacct .....	Gstaad
	iPaladin .....	Neuchatel (3rd Floor)
	Private Client Resources .....	Tincino (3rd Floor)
	SEI Archway .....	Alpine 1
	Solovis .....	Zermatt
	SS&C   GlobeOp .....	Alpine 2
	Trusted Family .....	Verbier
2:50 pm	Networking Break .....	Lucerne Foyer
3:15 pm	<u>Executive Dialogues</u>	
	Small Family Offices (1-6 Employees) .....	Lucerne 1
	Medium Family Offices (7-14 Employees) .....	Lucerne 2/3
	Large Family Offices (15+ Employees) .....	Alpine 2
	Multi-Family Office, Thought Leaders, and Wealth Advisor Councils .....	Alpine 1
	Technology Demonstration Providers .....	Currents (Concourse Level)
4:30 pm	Networking Break .....	Lucerne Foyer
4:45 pm	<u>Network Dialogue Meetings</u>	
	FOX Technology Operations and Data Security Network .....	Lucerne 2/3
	FOX Human Capital Network .....	Lucerne 1
5:30 pm	Forum Networking Reception .....	Edelweiss Penthouse (43rd Floor)
7:00 pm	Reception Concludes	

**Wednesday, July 19, 2017**

7:45 am	<b>Breakfast</b> .....	<b>Alpine</b>
8:45 am	<b>Opening Comments and Day One Recap</b> .....	<b>Lucerne</b>
9:00 am	<b>Tax and Estate Update</b> .....	<b>Lucerne</b>
10:00 am	<b>The Journey of the Family Office: A Formulated Approach to Modernizing Business Processes</b> .....	<b>Lucerne</b>
10:50 am	<b>Networking Break</b> .....	<b>Lucerne Foyer</b>
11:20 am	<b><u>Concurrent Breakout Sessions</u></b>	
	<b>Breakout A:</b> <b>State of the Art for D&amp;O and E&amp;O Insurance: Protecting the Family Office from Itself</b> .....	<b>Lucerne 1</b>
	<b>Breakout B:</b> <b>Family Office Business Process and Internal Control</b> .....	<b>Lucerne 2/3</b>
	<b>Breakout C:</b> <b>Lessons Learned in Moving to the Cloud</b> .....	<b>Alpine 2</b>
	<b>Breakout D:</b> <b>Matters of Security: A Family Case Study</b> .....	<b>Alpine 1</b>
	<b><u>Closing Keynote Sessions</u></b>	
12:30 pm	<b>Market Style Lunch – Grab and Listen</b> .....	<b>Lucerne Foyer</b>
12:45 pm	<b>Philanthropic Trends, Strategies and the Family Office - Maximizing Impact Through the Combination of Charitable Giving Vehicles</b> .....	<b>Lucerne 2/3</b>
1:35 pm	<b>Don't Get Swiped: How to Minimize the Risk, Monitor and Manage the Damage to Protect Your Identity and Finances</b> .....	<b>Lucerne 2/3</b>
2:25 pm	<b>Forum Closing Comments</b> .....	<b>Lucerne 2/3</b>
2:30 pm	<b>Adjournment</b>	