8:30 – 9:30  Registration

9:30 – 10:00  Welcome

**MC:** Stephen Harris, CEO, ClearView Financial Media
**SPEAKER:** Stephen Prostano, Partner, PKF O’Connor Davies
Co-Founder, Chairman, The UHNW Institute

10:00 – 10:15  Introduction to the 10 Domains

10:15 – 11:05  Client Complexity Accelerated: Family Trends Affecting the Multi-generational Family

**MODERATOR:** Jim Grubman, Owner, Family Wealth Consulting
Family-Advisory Relationships Domain Chair, The UHNW Institute

**PANELISTS:**
Stacy Allred, Senior Managing Director, First Republic Investment Management
Leadership & Transition Planning Domain Chair, The UHNW Institute

Angelique LeDoux, Managing Director, GTFO Capital Partners
Managing Editor, The UHNW Institute

Kathy Lintz, Partner & Managing Member, Matter Family Office
Learning, Development & The Rising Generation Domain Chair, The UHNW Institute

Laurent Roux, Principal, Willow Street Group
Advisory Board Member, The UHNW Institute

11:05 – 11:15  Break

11:15 – 12:05  Facilitated Breakout Sessions

12:05 – 12:35  Synthesis and Shared Insights

12:35 – 12:50  Break & “Grab” Lunch

12:50 – 1:05  Networking

1:05 – 2:05  Working Lunch: Importance of EQ in the Family-Advisor Relationship

**SPEAKER:** Dr. Rick Stevenson
Author, Speaker and Filmmaker, The 5000 Days Project
2:05 – 2:55

Provider Complexity Accelerated: Innovative Approaches to Support the Evolving Family

**MODERATOR:** Wally Head, Founder & Principal, Personal Fiduciary Advisors  
Co-Founder & Board Member, The UHNW Institute

**PANELISTS:**
- Katherine Dunlevie, President & CEO, The Family Office at Synovus  
Advisory Board Member, The UHNW Institute
- Jim Grubman, Owner, Family Wealth Consulting  
Family-Advisory Relationships Domain Chair, The UHNW Institute
- Drew McMorrow, President & CEO, Ballentine Partners  
Advisory Board Member, The UHNW Institute
- Dune Thorne, Head of Growth & Strategy, Brown Advisory  
Advisory Board Member, The UHNW Institute

2:55 – 3:45

Talent in 2030: The Core Challenge

**MODERATOR:** Jamie McLaughlin, CEO, J.H. McLaughlin & Co.  
Co-Founder & Board Member, The UHNW Institute

**PANELISTS:**
- Linda Mack, Founder & President, Mack International  
Board Member, The UHNW Institute
- Jonathan Miles, Partner, Deputy Chief Operating Officer &  
Head of Human Resources, BBR Partners  
Leaders Council Member, The UHNW Institute
- Milton Pedraza, CEO, The Luxury Institute  
Advisory Board Member, The UHNW Institute
- David Weller, Senior Partner, Leadership Alliance  
Advisory Board Member

3:45 – 3:55

Break

3:55 – 4:45

Facilitated Breakout Sessions

4:45 – 5:15

Synthesis and Shared Insights

5:15 – 5:30

Concluding Remarks

**SPEAKER:** Stephen Prostano, Partner, PKF O’Connor Davies  
Co-Founder, Chairman, The UHNW Institute

5:30 – 6:30

Networking and Cocktail Hour

7:00 – 9:00

Dinner

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