

AGENDA

8:30 – 9:30	Registration
9:30 – 10:00	Welcome MC: Stephen Harris , <i>CEO, ClearView Financial Media</i> SPEAKER: Stephen Prozano , <i>Partner, PKF O'Connor Davies</i> <i>Co-Founder, Chairman, The UHNW Institute</i>
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 , <i>Owner, Family Wealth Consulting</i> <i>Family-Advisory Relationships Domain Chair, The UHNW Institute</i> PANELISTS: Stacy Allred , <i>Senior Managing Director, First Republic Investment Management</i> <i>Leadership & Transition Planning Domain Chair, The UHNW Institute</i> Angelique LeDoux , <i>Managing Director, GTFO Capital Partners</i> <i>Managing Editor, The UHNW Institute</i> Kathy Lintz , <i>Partner & Managing Member, Matter Family Office</i> <i>Learning, Development & The Rising Generation Domain Chair, The UHNW Institute</i> Laurent Roux , <i>Principal, Willow Street Group</i> <i>Advisory Board Member, The UHNW Institute</i>
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 <i>Author, Speaker and Filmmaker, The 5000 Days Project</i>



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 Prozano, *Partner, PKF O'Connor Davies Co-Founder, Chairman, The UHNW Institute*

5:30 – 6:30

Networking and Cocktail Hour

7:00 – 9:00

Dinner

