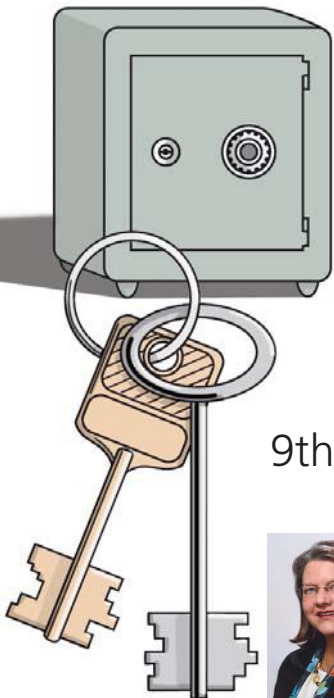


Family Office & Wealth Preservation Conference

On the Horizon: Changes Ahead for Family Offices. A Gathering of Thought Leaders in the Industry.

9th & 10th May 2007, Millenium Broadway Hotel, New York City



Conference Chair

Barbara Hauser
President
International Private Wealth
Advisor

She is on the 2007 Citywealth Top 100 international advisors, under the category of family offices

Prior: Director, Family Wealth Advisory Services, Citigroup Special Counsel, Private Client Department, Cadwalader, Wickersham Taft LLP



Co-Chair

Linda Bourn
Managing Director, Family
Office Practice Leader,
Marsh's Private Client
Services Practice

With the participation
of his Excellency Sheikh F. Al Qasimi (UAE)
and Mr Salem Aballah Salem Al Hosni (UAE)
represented by Dr Nabil Charaf, Attorney at Law.

DAY TWO 10th May 2007

Dr Nedim Peter Vogt (Switzerland)
Partner, **Bär & Karrer**

Mr Milton Pedraza (USA)
CEO, **The Luxury Institute, LLC**

Mr Robert Colvin Esq. (USA)
Founder, **Robert D. Colvin & Associates**

Mr Tom Boczar Esq. CFA (USA)
Director of Marketing/Financial Institutions,
Twenty-First Securities Corporation

Mr Alexander A. Bove, Jr. (USA)
Bove & Langa, P.C.

Ms Barbara Hauser (USA)
International Private Wealth Advisor

Ms Linda Bourn (USA)
Managing Director, Family Office Practice Leader,
Marsh's Private Client Services Practice

Mr Ivan Sacks (USA)
Principal, **Withers Bergman Law Firm**

Ms Lisa Lindsay (USA)
U.S. Practice Leader, **Marsh's Private Client Services**

Mr Tim Horner (USA)
Managing Director, **Kroll**

Ms Christel Mohr (USA)
Vice President, **Marsh's Luxury Yacht Practice**

Mr Jon Grouf (USA)
Partner, **Kirkpatrick & Lockhart Preston Gates Ellis LLP**

DAY ONE 9th May 2007

Mr Paul McKibbin (USA)
Director, **Family Office Metrics**

Ms Suzy Peterfreund Ross (USA)

Mrs Lisa Cavanaugh (USA)
Senior Vice President, **Christies**

Dr Ariel Sergio Goekmen (Switzerland)
Director, **Credit Suisse, Head Office**

Mr Ian A Marsh (United Kingdom)
Mediator and Managing Director,
Family Dispute Resolution Ltd

Ms Natasha Pearl (USA)
CEO and Founder, **Aston Pearl**

Mrs Suzanne J. Currie (USA)
Partner, **K Capital Partners, LLC**

Ms Lisa Gray (USA)
President/CEO, **Graymatter Strategies LLC**

Mr Todd Millay (USA)
Executive Director, **Wharton Global Family Alliance**

Programme

DAY ONE 9th May 2007

09:00 Co-Chairs' welcome & opening remarks

09:10 Shifting portfolio demands - technology and the private equity centered Family Office

- The trend is for family offices to invest as both limited partner and general partner
- How does the portfolio view shift?
- How can the risk in a co-investment portfolio be measured?
- How can family offices adapt technology tools from the private equity world to their own needs?

Mr Paul McKibbin (USA)

Managing Partner; Family Office Metrics LLP

Prior: director of GPFN

Co-founder and president of Private Family Networks

Vice president in charge of technology for SEI Investment's Family Office unit

09:55 Family concerns, legacies, philanthropy and art

Ms Suzy Peterfreund Ross (USA)

CEO, FamilyLegacy

Mrs Lisa Cavanaugh (USA)

Senior Vice President, Christies

10:40 Coffee

11:00 New ways to manage family wealth changes for Family Offices?

- The Old World and old instruments
- The New World and new tools
- Views and Consequences

Dr Ariel Sergio Goekmen (Switzerland)

Director; Credit Suisse, Head Office

Vice-President of the British Swiss Chamber of Commerce

11:45 Managing conflict in the Family Office:

- The next generation, buying-in or just signing-up?
- Dealing with miscommunication, unmet expectation, frustration and disappointment
- Avoiding entrenchment and demonisation
- Judges can't sign treaties

Mr Ian A Marsh (United Kingdom)

Mediator and Managing Director; Family Dispute Resolution Ltd

12:30 Lunch

14:00 How the Single Family Office manages the "soft" issues: what can we learn?

- What are families seeking in lifestyle management and concierge services?
- Best practices in managing domestic staff
- Trends in "bespoke" health care, aviation, and other areas
- Using in-house and external resources to provide services

Ms Natasha Pearl (USA)

CEO and Founder, Aston Pearl

Prior: Senior Vice President and Worldwide Director of Relationship Marketing at Sotheby's

Chief Marketing Officer for Circline

14:45 Alternative investment strategies: is it time for Asia/Pacific allocations?

- Review of Asset Allocation
- Pan-Asian Opportunities
 - Thematic Approach: Growth of the Asian Consumer
 - India: High Technology with Democracy
 - Australia: The Culture, Down 'Under
- Opening up the Asset Allocation Pie for Pan-Asian Exposure
- Diversifying Strategies; Non Correlation of Asset Classes
- Wayne Gretzky Investing: Going Where the Puck "Will Be"

Mrs Suzanne J. Currie (USA)

Partner, K Capital Partners, LLC

Prior: was on the management team that founded Shelterwood Financial Services, LLC, the family office of the Huber family

Partner with Ardsley Partners, LLC

Honored with the 2003 Hedge Fund Cares nomination and award for her considerable philanthropic reach into communities in need

15:30 Coffee

15:45 The three forms of governance: a new approach to family wealth transfer and asset protection

- Three entities of family: their differences and their critical relationship
- A new definition of family and family wealth
- Cyclical vs linear thinking
- The roles of the family and the family business
- The role of the family office

Ms Lisa Gray (USA)

President/CEO; Graymatter Strategies LLC

16:30 A framework for understanding Family Office trends

- Develop new sources of knowledge
- Unbundle, measure and innovate
- Pursue opportunities globally

Mr Todd Millay (USA)

Executive Director; Wharton Global Family Alliance

17:15 Cocktail

09:00 Co-Chairs' welcome & opening remarks

09:10 Families are globalizing – but not the law (trusts, spouses and heirs from a (Swiss) civil law perspective)

- (Swiss) Civil Law Matrimonial Property Rules
- (Swiss) Civil Law Forced Heirship Rules
- (Swiss) Civil Law Rules against Perpetuities
- Avoiding Trust Litigation by Creating a Level Playing Field

Dr Nedim Peter Vogt (Switzerland)
Partner; Bär & Karrer

09:55 The Wealthy Consumer and luxury trends

- Learn about key habits and behaviors of the wealthy and ultra-wealthy
- Learn why and how these trends affect your business
- With a special emphasis on the evolving Internet Habits of the Wealthy

Mr Milton Pedraza (USA)
CEO ; The Luxury Institute, LLC
Advisor to the Boards of Directors

Prior: Senior V.P. and General Manager, Luxury Markets for a travel and leisure division of Wyndham Worldwide

10:40 Coffee

11:00 Disparate Tax Treatment of Different Investment Tools

- Various “tools” achieve economically equivalent results
- Tax treatment differs-select tool delivering best tax results
- This is free “tax alpha” for sophisticated, well-advised investors
- Real world applications: stock concentration risk management, structured products
- Hidden risk-legal duties of fiduciaries under Prudent Investor Act

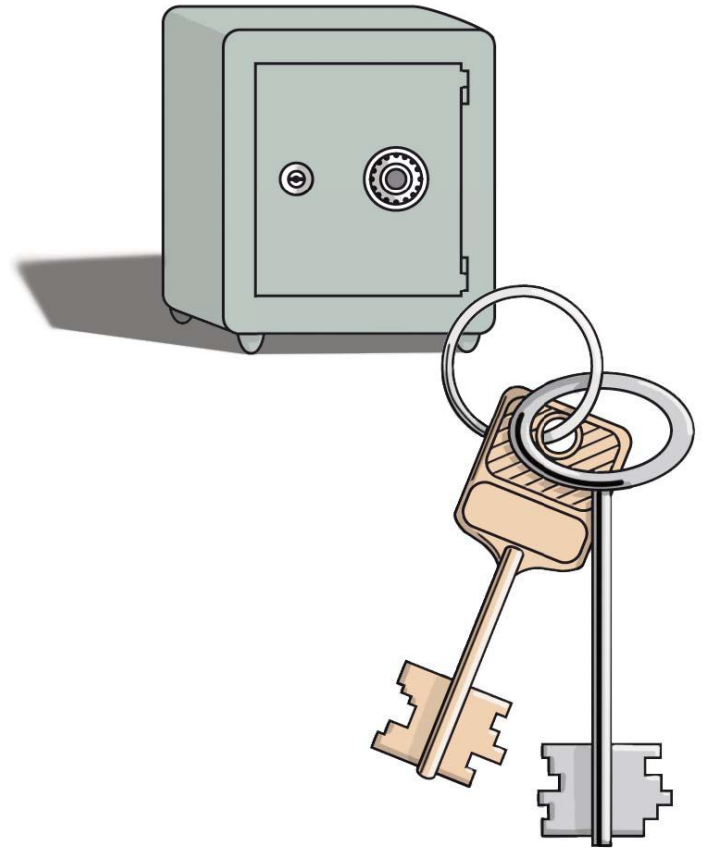
Mr Thomas J. Boczar, Esq., CFA
Director of Marketing/Financial Institutions; Twenty-First Securities Corporation

Prior: Tax accountant with Touche Ross
Lawyer with Mudge Rose and Cahill Gordon & Reindel
Board member of New York Society of Security Analysts

Mr Robert D. Colvin, Esq.
Founder, Robert D. Colvin & Associates

Prior: Partner in Baker & McKenzie International Private Banking Group
Partner in International Tax Section of Chamberlain, Hrdlicka, White, Williams & Martin PC
CPA in International Tax Group of KPMG. LL.M. in Taxation

12:30 Lunch



14:00 Asset protection: the missing chapter from the Family Office manual

- Coordinating the work of the family's different legal counsel, including corporate, securities, real estate, and divorce attorneys to inform of risks and create a blueprint for wealth protection
- Identify exposure to liabilities inside and outside the family and the family business
- Identify strategies to protect family assets

Mr Alexander A. Bove, Jr. (USA)
Bove & Langa, P.C.

14:45 Next generation issues: topics of the most concern

- Education
- Mentorship
- The Pursuit of Happiness

Ms Barbara Hauser (USA)
International Private Wealth Advisor

She is on the 2007 Citywealth Top 100 international advisors, under the category of family offices

Prior: Director, Family Wealth Advisory Services, Citigroup
Special Counsel, Private Client Department, Cadwalader, Wickersham Taft LLP

15:30 Coffee



15:45 Managing risk: navigating the unique liability exposures families face

- Security and Crisis Management-critical elements that every family must employ to be prepared
- Evaluating Private Aviation Security, Liability, flight operations management
- Luxury Yacht Ownership & Charter/Cruising

Panel Moderator:

Ms Lisa Lindsay (USA)

U.S. Practice Leader, Marsh's Private Client Services

Mr Ivan Sacks (USA)

Principal; Withers Bergman Law Firm

Mr Tim Horner (USA)

Managing Director, Kroll

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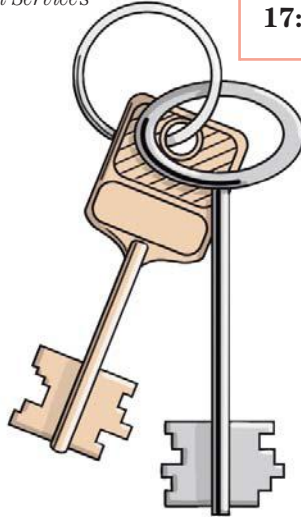
16:30 Moving around: tax aspects of changing residencies

- Expatriating from the U.S.
- Emigration to the U.S.
- Interim offshore planning
- Impact on investment assets

Mr Jon Grouf (USA)

Partner; Kirkpatrick & Lockhart Preston Gates Ellis LLP

17:15 Closing Remarks



Financial Events *International*

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Millenium Broadway Hotel **** 145 West 44th Street, New York City, United States

Please contact us for special hotel rates – e-mail: l.plumet@financial-events.ch

Registration fee 2600 US\$ / 2000 € / 1400 GB£ / 3200 CHF

A discount will be granted for additional delegates from the same company

A special rate is granted for family officers

Bank transfer details :

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Please register the following delegate for this conference:

Name :

Title :

Company :

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E-Mail :

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Place/Date/Signature :

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