Tuesday, October 23, 2018

6:30 PM – 8:00 PM	**Official Welcome Reception** Join us to kick off this year's event with fellow industry professionals for refreshments and hors d'oeuvres.

Wednesday, October 24, 2018

8:00 AM	**Exhibit Set-Up**
8:00 AM	**Registration**
8:00 AM	**Hospitality Lounge Open** **Sponsored by:** **Camelback Odyssey Travel**
8:30 AM	**Networking Continental Breakfast in Exhibit Hall** **Sponsored by:**
9:00 AM	**Opening Remarks**
9:15 AM	**The Modern Day Family Office: How to Properly Structure & Select Resources That Fit Your Family's Needs** **Moderator:** **Panelists:** **Thomas Handler, J.D., P.C., Partner & Chairman of Advanced Planning and Family Office Practice Group, Handler Thayer, LLP** **Joseph Ehrlich, Executive Vice President, Owens Group** **TBA, Trinet**
10:15 AM	**Social Investing: Building Systems that Attract Investors** • Critical Steps to an Effective Investing Strategy • When do the big trends and solutions become additive and generate "alpha"?

	• Increased interest in community investing? • Investors want to see that their impact is making a real difference for working people. How do you achieve that? • What Will It Take to Get to Scale? • Dos and Don’ts for Social Entrepreneurs Seeking Funding • Theme-Specific Investments? • Hidden Risks and the Importance of Fund Level Due Diligence • Designing unique investment programs for high-net-worth clientele • Tax consequences of investment actions. **Moderator:** **Panelists:** **Douglas Evans, Senior Managing Director, Abbot Downing (MFO)**	
11:20 AM	**Networking Refreshment Break in Exhibit Hall** **Sponsored by:**	
11:40 AM	**TBA, Pretium Partners**	
12:00 PM	**Jeffrey Bronchick, CFA, Founder and CIO, Cove Street Capital**	
12:20 PM	**TBA, Altegris Investments**	
12:40 PM	**Keynote Presentation** **M.K. Palmore, CISM, CISSP, Assistant Special Agent in Charge, Federal Bureau of Investigation**	
1:10 PM	**Networking Luncheon** **Sponsored by:**	
SPLIT TRACKS	***Track A***	***Track B***
2:30 PM	**Investing in Private Equity and Venture Capital Deal Structures** **Moderator:** **Howard Cooper, Chief Executive Officer, Cooper Family Office (SFO)** **Panelists:** **Scott C. Smith, Partner, Hanson Bridgett LLP**	**Investing in Sustainable and Disruptive Technology** Moderator: **Nathan McDonald, Managing Partner and CEO, Keiretsu Capital** Panelists: **TBA, Keiretsu Capital** **TBA, Keiretsu Capital** **TBA, Keiretsu Capital** **TBA, Keiretsu Capital**

3:30 PM	**Investing in Private Debt and Direct Lending (or Opportunities in Credit Investing)** **Moderator:** **Panelists:**	**Non-Correlated Alternative Fund Strategies** **Moderator:** **Mark Perry, Managing Director, Wilshire Consulting** **Panelists:** **TBA, Corry Capital Advisors, LLC**
4:30 PM	**Investing in Fixed Income: Investing in a Rising Rate Environment** **Moderator:** **Michael Wagner, Director of Fixed Income, Tolleson Wealth Management (MFO)** **Panelists:** **Howard Coleman, JD, Chief Investment Officer, Coldstream Wealth Management (MFO)**	**Investing in Niche Strategies and Emerging Managers** • Defining today's niche strategies and how niche can become mainstream • Investing early to build relationships for successor funds • Finding scalable niche and emerging opportunities • Seed and acceleration economics • Underwriting newer firms, additional diligence steps: terms, team, track record, infrastructure **Moderator:** **Phillip Vitale, Chief Investment Officer, Filament Advisors, LLC (MFO)** **Panelists:**
5:15 PM–6:15 PM	**Networking Cocktail Reception in Exhibit Hall** Join us and unwind with fellow industry professionals for refreshments during our last networking break of the day. **Sponsored by:** **Altegris Investments**	

Thursday, October 25, 2018

8:00 AM	**Networking Continental Breakfast in Exhibit Hall** **Sponsored by:**
8:00 AM	**Registration & Exhibit Hall Open**
8:00 AM	**Hospitality Lounge Open** **Sponsored by:** **Camelback Odyssey Travel**

7:30 AM	**Private Closed Session for Family Offices** **(Family Offices ONLY)** **"Family Issue Processing"** This private, closed-door session is designed exclusively for foundations, family offices, multi-family offices, non-discretionary consultants and accredited high-net worth individuals. Opal is committed to enhancing experiences and interaction for Families and Family Offices and is consequently dedicating an extended session to them. Peer-to-peer conversation on key issues for participants, which will depend on interest, and may include: Participants are expected to share experiences, thoughts, concerns, challenges, and solutions in a private peer exchange setting. The session will be a facilitated, interactive, dynamic conversation among the participants. **No Managers or Service Providers will be allowed in the session, no exceptions.** Facilitator: **Julie Neitzel, Partner, WE Family Offices (MFO)**	
8:30 AM	**Opening Remarks**	
8:40 AM	**Gordon Short, Managing Director, GBX Group LLC**	
SPLIT TRACKS	**Track A**	**Track B**
9:00 AM	**Real Estate Investing: Building, Balancing and Tweaking Your Portfolio** **Moderator:** **William Lappas, Managing Director, Woodbridge Capital Partners LLC (SFO)** **Panelists:**	**Investing in the Cannabis Industry** **Moderator:** **Sherri Haskell, Founder, CEO, CannaAngels LLC** **Panelists:**
10:00AM	**Investing in the Energy Markets** **Moderator:** **Panelists:**	**Crypto Currency Market Investments** **Moderator:** **Panelists:** **Brian Sewel, CIO, Rockwell Fund**
11:00 AM	**Networking Refreshment Break**	

	Sponsored by: **Advisor Partners**
11:20 AM	**Investing in Blockchain - Distributed Ledger Technology (DLT)** **Moderator:** **Panelists:**
12:20 PM	**Jonathan Lewis, Managing Partner, JLJ Capital**
12:40 PM	**TBA, Advisor Partners**
1:00 PM	**Networking Luncheon** **Sponsored by:** **JLJ Capital**
2:15 PM	**Keynote Presentation** **Todd Barnum, Chief Information Security Officer, GoPro, Inc.**
2:45 PM	**Tracking the Smart Money: Family Office CIO Roundtable:** This panel will be a discussion of family office CIOs looking at where they think the smart money is being invested and the strategies they see being the best fits for investors in not only today's markets but moving forward. **Moderator:** **Panelists:**
3:45 PM	**Impact Investing: Driving Social Purpose Through Measurable Investment Returns** • Exploring the Role of Alternatives in Impact Investing • Measuring Social Impact with Big Data Analytics • How can Big Data innovate Impact Investing? • Top 5 Challenges in Impact Investing Projects • ROI strategies for impact investments • Breaking Down ESG/SRI Strategies **Moderator:** **Carolyn Weiss, CFO & Treasurer, New York Community Trust** **Panelists:** **Kimberly Wood, President/CEO, Kennedy Capital Management, Inc.**

4:45 PM	**Portfolio Harmony: Balancing Your Asset Allocation and Portfolio Construction While Managing Risk to Maximize Investment Returns** • Risk? What Risk?" Risk is more than volatility. • Net under the High Wire?" Protecting portfolios against volatility. • No, Wait, I Can MAKE Trading?" Investing in volatility. • Prognosis for markets, near and longer-term. • Targeted asset allocation strategies moving forward • Using technology to monitor your portfolio and manage risk • US equity and bond markets have enjoyed lengthy bull markets, are we at risk of these markets going against us? **Moderator:** **Brandon Laughren, Chief Investment Officer, The Laughren Group (SFO)** **Panelists:** **Keith Seibert, Managing Director, Hedge Funds and Public Markets, CM Capital Advisors, LLC (SFO)** **Michael Schulman, Managing Director, Senior Portfolio Manager, Hollencrest Capital Management (MFO)** **Joseph Meyer Jr, President/Chief, Investment Officer, Statim Holdings, Inc. (SFO)** **Michael Wu, Investment Strategist, Vice President, GenSpring SunTrust Private Wealth (MFO)**
5:45 PM – 6:45 PM	**Networking Cocktail Reception in Exhibit Hall** Join us and unwind with fellow industry professionals for refreshments during our last networking break of the day. **Sponsored by:** **GBX Group LLC**

Friday, October 26, 2018

8:00 AM	**Continental Breakfast** **Sponsored by:**
8:00 AM	**Hospitality Lounge Open** **Sponsored by:** **Camelback Odyssey Travel**
8:00 AM	**Private Closed Session for Family Offices** **(Family Offices ONLY)** As a High Profile Family Leader/CEO/Executive it can be lonely at the top. Who do you have as a professionally experienced, impartial and trusted advisor that you and your family can rely on to help with your most pressing family challenges, business issues and opportunities? Please join us during this interactive, and thought provoking session to learn how having your own Performance Coach/"Wendy Rhoades" can create immeasurable financial and personal returns.

	This private, closed-door session is designed exclusively for foundations, family offices, multi-family offices, non-discretionary consultants and accredited high-net worth individuals. Opal is committed to enhancing experiences and interaction for Families and Family Offices and is consequently dedicating an extended session to them. Peer-to-peer conversation on key issues for participants, which will depend on interest, and may include: Participants are expected to share experiences, thoughts, concerns, challenges, and solutions in a private peer exchange setting. The session will be a facilitated, interactive, dynamic conversation among the participants. **No Managers or Service Providers will be allowed in the session, no exceptions.** Facilitator:
9:00 AM	**Welcome Remarks**
9:15 AM	**North Bay Community Resilience Initiative: The path to resilience and sustainability** **Greg Thomson, Director, Community Microgrid Initiative, Clean Coalition**
9:35 AM	**Standalone**
9:55 AM	**Standalone**
10:15 AM	**How Can Families Access the Best Direct Deal Flow via GP/Co-investments or Family Office Consortiums?** **Moderator:** **DJ Van Keuren, VP of Family Office Capital, Hayman Family Office (SFO)** **Panelists:** **Ron Diamond, CEO, Diamond Wealth Strategies** **Christopher Nolte, President, Marcus Investments (SFO)**
11:00 AM	**Engaging the Next Gen to be Stewards of the Family Legacy** **Moderator:** **Skip Coomber, III, President, Coomber Family Estates (SFO) / Dragon Trust Family Office (SFO)** **Panelists:**

11:45 AM	**Governance and Trusts: Planning for the Next Generation** **Moderator:** **Biff Pusey, Senior Wealth Advisor & Portfolio Manager, Keel Point (MFO)** **Panelists:** **Susan R. Schoenfeld, CEO and Founder, Wealth Legacy Advisors LLC**
12:30 PM	**Closing Remarks**
1:00 PM	**Napa Valley Wine Tour and Luncheon Networking Event at** **Sponsored by:**

2018 CONFIRMED DELEGATES

SINGLE FAMILY OFFICES AND PRIVATE INVESTORS
Managing Director, Jaggi Family Office (SFO)
Managing Director, Mission Oak Capital (SFO)
General Counsel, S.L. Contursi, Inc. (SFO)
President, Coomber Family Estates (SFO) / Dragon Trust Family Office (SFO)
VP of Family Office Capital, Hayman Family Office (SFO)
Chief Executive Officer, Cooper Family Office (SFO)
Director, Alta Ridge (SFO)
Chief Investment Officer, Jaggi Family Office (SFO)
Managing Director, Blue Sand Holdings (SFO)
CEO, Quince Associates (SFO)
Founder, Villa Della Luna Family LLC (SFO)
Chief Investment Officer, The Laughren Group (SFO)
Partner, White Oak Equity Partners (SFO)
President, Synergy Trust Partners, LLC (SFO)
President, Coomber Family Estates (SFO) / Dragon Trust Family Office (SFO)
Managing Director, Woodbridge Capital Partners LLC (SFO)
Managing Director, Hedge Funds and Public Markets, CM Capital Advisors, LLC (SFO)
President, Marcus Investments (SFO)
Managing Director, Baciu Family Capital (SFO)
President/Chief Investment Officer, Statim Holdings, Inc. (SFO)
CFO, Samerian Foundation, Inc / Simon-Skjodt Enterprises, LLC (SFO)
CEO, Irish Family Office (SFO)
President, Quantelligent Solutions, LLC

MULTI-FAMILY OFFICES
Sr. Vice President & Portfolio Manager, Northland Wealth Management (MFO)
Senior Wealth Advisor & Portfolio Manager, Keel Point (MFO)
President, MSF Capital Advisors (MFO)
Director of Alternative Investment Research, Shepherd Kaplan Krochuk, LLC (MFO)
Chief Investment Officer, Coldstream Wealth Management (MFO)

Managing Director, Senior Portfolio Manager, Hollencrest Capital Management (MFO)
Senior Managing Director, Abbot Downing (MFO)
Chief Investment Officer, Filament Advisors, LLC (MFO)
Director of Fixed Income, Tolleson Wealth Management (MFO)
Investment Strategist, Vice President, GenSpring SunTrust Private Wealth (MFO)
Special Projects, Monroe Capital Partners, LLC (MFO)
Partner, Monroe Capital Partners, LLC (MFO)
Partner, WE Family Offices (MFO)

CONSULTANTS
Co-Managing Partner, The Strategic Group of Companies
CIO/Allocator, Global Wealth Analytics
Managing Director, Wilshire Consulting
Founder and Managing Partner, SGG WORLD LLC
CEO and Founder, Wealth Legacy Advisors LLC
CEO, Diamond Wealth Strategies
Partner, Cypress Capital Group
CEO & CIO, Endowment Research Group

ENDOWMENTS & FOUNDATIONS
CFO & Treasurer, New York Community Trust
President, Laguna Woods United Methodist Foundation Inc.

OTHER / FUNDS OF FUNDS
Development & Strategic Partnerships Director, Clean Coalition
Director, Community Microgrid Initiative, Clean Coalition