

SEFOF



SOUTHEASTERN
FAMILY OFFICE FORUM

September 21-23, 2016

Georgia Tech Hotel and Conference Center
Atlanta, Georgia

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CONFIDENTIALITY & CODE OF ETHICS



A key element of The Forum is to create a safe, academic environment in which participants can interact with other families who face many of the same issues. All discussions are expected to be kept in strict confidence and there is a

strict no solicitation policy.

Open communications, sharing of experiences, and networking are key to the success of The Forum and greatly enhance the experience. However, complete confidentiality is critical to facilitating such interaction and by registering for this program, attendees agree to keep all information in the strictest of confidence. It is also recognized that in addition to serving their own family, some families provide investment advice or other services to outside families. As part of the The Forum code of conduct, attendees are expected to adhere to a strict no solicitation policy.

Finally, program sponsors were selected with great care due to their specialized expertise and history of thought leadership in serving the unique needs of family offices and other families of significant wealth. While interaction and exchanging of business cards for future contact is entirely appropriate and encouraged, sponsors have been asked to keep all conversation on an educational level while at The Forum. Further, they are expected to adhere to the same level of confidentiality and no solicitation as are all other attendees.

OUR FOUNDER



Michael Brink, Founding Chair of the Southeastern Family Office Forum and proud and valued partner of Wellspring Associates in Atlanta, Georgia, passed away on April 28, 2013. Michael was a frequent speaker and author with over 30 articles published regarding wealth transfer and life insurance due diligence. He served on the editorial board of Wealth Management Business magazine and his work regarding the integration of life insurance with philanthropy is used by the American College in their Philanthropic Advisor Certification program. In

addition to other professional and community involvement, Michael was past president of the Atlanta Estate Planning Council, past chairman of the Planned Giving Advisory Board for The Community Foundation of Greater Atlanta, and served on the Advisory Board for the Cox Family Business Center at Kennesaw State University.

Michael's involvement in the family office industry was extensive, as a member of the Leaders Council for the Institute for Private Investors (IPI), a former Strategic Advisor to the Family Office Exchange (FOX) and member of the Family Wealth Alliance. Through his involvement with FOX, Michael was deeply involved in the development of the first-ever survey regarding the use of life insurance by the ultra-affluent, the results of which were featured in Worth magazine.

Michael was an avid water and snow skier and was a former auxiliary member of the National Ski Patrol. He was also a former marathon runner and enjoyed coaching youth athletics.

Michael was full of life and was fully engaged in the lives of his family and friends. He possessed a rare combination of the ability to dream big and the drive to make his dreams come to fruition. His wife, Deb, and their son, Nicholas, wrote that they had never met anyone more positive, determined, trusting and forgiving. Michael left behind a beautiful legacy and is sorely missed.

EVENT CHAIR



Brian J. Hughes
President & Founder, Hughes Growth Strategies, LLC

Brian has been involved in the Southeastern Family Office Forum since the founder and good friend, the late Michael Brink, discussed the idea of creating a peer to peer network for successful families in the Southeast.

After spending nearly 30 years as an accomplished executive in the family office and wealth management industry, Brian launched a consulting firm focused on helping families, family offices, private foundations and other wealth owners evaluate, find and engage advisors. He also helps advisors organically grow their firms. Brian has worked with hundreds of successful families and private foundations and provides an independent, unbiased view of the advisor space, including wealth managers, attorneys, accountants, family business and family systems consultants, philanthropic advisors and organizations that provide social and environmental impact advice, products and solutions.

Prior to the launch, Brian was responsible for building and cultivating family and private foundation relationships at two privately held multi-family offices, The Threshold Group and Pitcairn. He spent 15 years with Lincoln Financial Advisors where he served as regional CEO for Lincoln and Sagemark Consulting, a fee-based financial planning firm in St. Louis, MO.

Brian has been a featured speaker at many programs around the country, including the Wealth & Giving Forum, Impact Capitalism, RayLign's Family Frontiers, the IIR Family Office Forum, the Family Wealth Alliance Advisor Forum, the Family Firm Institute Annual Meeting, the Family Office Symposium, Schwab IMPACT, CFA Society of Philadelphia and the Pilot Family Office Summit.

Brian earned a BA in Economics and Marketing from University of Tampa and completed the Private Wealth Management Program at the Wharton School, University of Pennsylvania, and a Chartered Life Underwriter from the American College.

In addition to his role as a Chair of the Forum, Brian serves as a strategic advisor for Strategic Philanthropy, Ltd. Brian and his wife Carey have two young children and reside in a Northwest suburb of Philadelphia.

AGENDA

WEDNESDAY, SEPTEMBER 21

11:00 AM–1:00 PM Registration

1:00 PM–1:30 PM Welcome and Overview by Brian Hughes, Forum
Chair, and Greg Raabe, Wellspring Associates

1:30 PM–2:30 PM Keynote Address: The Legacy Family...Strategies for
Creating Successful Multigenerational Families

Speaker: Dr. Lee Hausner

Families today are faced with the challenge of successfully transmitting to future generations the values and discipline which enabled founders to create the success these families currently enjoy. This presentation will elaborate on the shared characteristics of successful multigenerational families and the tools necessary to maintain success generationally.

2:30 PM–3:00 PM Break

3:00 PM–4:15 PM Concurrent Tracks—Session I

FAMILY OFFICE (A): FO 101

Panelists: Roy Jones, Cathy Family Office
Galen Oelkers, The Zeist Company

Moderator: Christine Franco, Chinquapin Trust Company

Does my family need a family office? How do I determine if a family office will benefit our family's goals and objectives? When does it make sense? Do I already have a family office and not know it? What role does the "family" have in the family office? What are the primary questions concerning strategic planning, structure, governance, staffing, services, reporting, investing...and more... that should be considered? What best practices should a family office adopt during its first 2 years of existence? Join us for an interactive session to discuss the basics, explore alternatives and share observations and experiences.

AGENDA

FAMILY OFFICE (B): FO 201: We've Opened the Family Office—Now How Do We Serve our Clients?

Panelists: Scott Hirsch, The Benida Group
Jill Barber, CYMI, Ltd.

Moderator: Phil Fontana, KKP Group

After dealing with the myriad of issues associated with opening the family office, executives move to addressing the realities and practicalities of providing client service. What topics should be addressed with family members? How and when will topics such as investment results, cash flow, estate planning, insurance, and achievement toward wealth management goals be discussed? How will trusts be administered? How will meaningful client satisfaction information be obtained? This practical session will aim to provide a guide to creating a client service program for younger offices and new ideas to consider for those with existing service platforms. The session will offer sample reports and illustrations executives can use to serve their clients.

FAMILY BUSINESS: From Haws Corporation to Traynor Family Enterprises: How One Multi-generational Family Business Leveraged the Competitive Advantage of Family Ownership

Moderators: Dan Bowman, Tibbetts Holdings
Kiki Mahar, Tauck, Inc.

In this moderated session, members of Traynor Family Enterprises will discuss the transformation of Haws Corporation, which manufactured drinking fountains, into Traynor Family Enterprises, a growing group of businesses. They will discuss the successful harnessing of the human capital of the Haws/Traynor family and the enterprise capital of the original business, by applying the practice of Vertical Leadership.

FAMILY COHESION: Inter-personal Relationships and Communication: Growing Social Capital

Moderator: Dr. Lee Hausner

Family legacy is dependent on effective communication. In this session families will hear from an industry leader and family on best practices for establishing effective methods of communication between generations.

AGENDA

FAMILY LEGACY: Successfully Engaging the Next Generation Through Family Philanthropy...How Do We Get the Next Generation Involved?

Panelists: Ashley Duchossois Joyce, The Duchossois Family Foundation
Kim Duchossois, The Duchossois Family Foundation
Rodney Pilot, Pilot Catastrophe Services
Jordan Pilot, RJJ Family Foundation

Moderator: Brian Friedman, Wellspring Associates

The next generation is coming of age. How do we find opportunities to keep them interested, involved and most importantly continue their path on becoming responsible stakeholders in continuing the family's legacy? Our panel of family members will share their personal stories on how they either passed the baton to a younger generation or how the next generation took that baton and created growth and new opportunities.

- 5:00 PM–6:00 PM Cocktails/Hors d'oeuvres
- 7:00 PM–9:00 PM Hosted Local Dinners
- 9:00 PM–Midnight NextGen Lounge @ The Garden at Community Smith, Renaissance Hotel

THURSDAY, SEPTEMBER 22

- 7:15 AM–8:15 AM Breakfast
- 8:15 AM–8:30 AM Opening Remarks
- 8:30 AM–9:30 AM Keynote Address (Plenary): Creating a Long-lasting Legacy of Positive Change in Your Community
- Panelists:** Jerome Russell, H.J. Russell & Company
Frank Fernandez, Arthur M. Blank Family Foundation
John Stephenson, Chick-fil-A
- Moderator:** Alicia Philipp, Community Foundation for Greater Atlanta

In this panel, representatives from three prominent Atlanta families, the Blanks, Cathys, and Russells, will share how they are using their family philanthropy to launch innovative and bold initiatives that will create long-lasting, positive change in Atlanta, particularly in the impoverished Westside community.

AGENDA

9:30 AM–10:00 AM Break

10:00 AM–11:15 AM Concurrent Tracks—Session II

FAMILY OFFICE: Effectiveness of Using Outside Board Members

Panelists: Chris Galloway, Former CEO, Okabena
Toby Dayton, Chairperson, Okabena
Amy Renkert-Thomas, Founder and Lead
Consultant for Renkert-Thomas Consulting, LLC

Moderator: Mariann Mihailidis, Family Office Exchange

Seasoned Board members will discuss their experience as board members. Owners will discuss why their family decided it was time to include outsiders on the board, the benefits, and how they found the talent to sit on the board. Independent board members will also share their experiences serving on boards of a family business, family office, private trust company and private family foundation.

FAMILY BUSINESS: Vertical Leadership: A Workshop

Moderator: Greg McCann, McCann & Associates

This workshop will give participants an in-depth understanding of the concept of Vertical Leadership and how it can help family business leaders refocus on shareholder value by measuring success based on return on human and enterprise capital as well as financial capital. Following an overview of vertical leadership and family enterprise models, participants will have an opportunity to practice working with Vertical Leadership tools in small groups. Participants will receive a workbook and the opportunity for ongoing training and support in putting their new Vertical Leadership skills to work.

FAMILY COHESION: Education: Inter-personal Development and Education: Growing Intellectual Capital

Panelists: Ashley Caldwell Levi, H.G. Hill Company
Joshua Nacht, Bird Technologies
Whitney Van Der Hyde, Perdue Farms

Families that play together stay together and families that learn together build a deeper awareness of life and a shared understanding of challenges and possibilities. Shared learning experiences help family members see the world through another set of eyes. Come and learn how families grow exponentially from learning and growing together.

AGENDA

FAMILY LEGACY (A): Keeping Your Family Legacy Alive... Who Are We as a Family, and How Do We Pass on Family Culture, Values, Rituals and Traditions, History and Stories?

Panelists: Wanda Ortwine, Luck Companies
Richard Luck, Luck Companies
Merial Currier, Gates Capital Management
Leah Hemeyer, MA

Moderator: Donaldson Brown, Attorney & Family Trustee

Multi-generational families often struggle to maintain the culture, traditions and values which were integral to their success. How do we identify, celebrate and pass on the rich heritage to younger and future generations? Why is it important? Our panel will share how they have gone about keeping the family stories and legacy alive. This session will run concurrent to the site visit.

FAMILY LEGACY (B): Place-based Philanthropy in Atlanta (Session ends at 1:00 PM and includes lunch)

For those interested in seeing the impact of place-based philanthropy, join us as we head outside of the conference to explore several projects spearheaded by families passionate about changing lives and communities in Atlanta. The site visits and conversation will highlight the impact of a concentrated effort of various philanthropically-minded families to change a specific geographical area in Atlanta. Lunch will be provided.

11:15 AM–1:00 PM Lunch in the Dining Room

1:00 PM–2:00 PM Keynote Address: Casting a Vision for Wealth & Its Purpose

Speaker: David York

When David York started doing estate planning in 1997, he did so based on three fundamental assumptions: The first was that a person's wealth could be summarized on a balance sheet; The second was that if transferring some financial wealth was good that transferring more would be even better; The third was that the first place you should go to do estate planning was an estate planner. The longer he practiced, the more he came to realize that these fundamental assumptions were fundamentally wrong and potentially destructive, especially for higher net worth individuals. David will be discussing what is wrong with the current estate planning model and how it can be fixed. He will also review seven disciplines that successful families follow to effectively transfer holistic wealth on a multi-generational basis.

2:00 PM–2:30 PM Break

AGENDA

2:30 PM–3:30 PM **Keynote Address: Myths & Mortals: Family Business Leadership and Succession Planning**

Speaker: **Andrew Keyt**

This presentation will show next generation leaders how to establish credibility, persevere through failure, honor the past while charting a “way forward”. In groundbreaking research, Keyt interviewed more than 25 successors of family business legends including Massimo Ferragamo, Bill Wrigley Jr., Christie Hefner, and John Tyson to find out how they overcame the challenges successors commonly face. The analysis from that study formed the basis for the strategies presented here—to help you win the loyalty of those stuck in the old way of doing business, and still focused on their former leader’s vision. You’ll learn how to take charge without sacrificing your own leadership style, and how to get everyone on board with your vision for the business.

3:30 PM–5:00 PM **Peer Groups**

6:00 PM–9:00 PM **Dinner @ Delta Museum**

FRIDAY, SEPTEMBER 23

7:15 AM–8:15 AM **Breakfast**

8:15 AM–8:30 AM **Opening Remarks**

8:30 AM–9:30 AM **Keynote Address: Generation Z: Engaging Today’s Media Savvy Youth in Philanthropy**

Speaker: **Susan Price**

The world of Generation Z—today’s toddlers through teenagers—is vastly different from that of Gen X and Y because of technology and social media. Susan Crites Price, author of Generous Genes: Raising Caring Kids in a Digital Age (2015, Majestic Oak Press), helps families navigate this landscape and inspire children, grandchildren and other young people to use both virtual and real life experiences to become passionate, engaged givers.

9:30 AM–10:00 AM **Break**

AGENDA

10:00 AM–11:15 AM **Concurrent Tracks—Session III**

FAMILY OFFICE: Preparing for the Inevitable—The Role of the Family Office When There is a Death in the Family

Panelists: Martha Lawrence, Cathy Family Office (Chick-fil-A)
Eileen Scherberger, The Zeist Company
Kyle Wright, Commune LP
Bob Boetticher, LHT Consulting

Moderator: Laura Liang, Enterprise Products Co.

This session will provide the family office with real tools when planning for the inevitable. Do you have copies of wills and relevant documents? Do you know where all of the assets are? Who is planning the service or has it been pre-planned? Is there a need for media management or security? Who needs to be notified, and when and how should the communication come? Does the family want any, some, or all of this managed by the family office?

FAMILY BUSINESS WORKSHOP: Vertical Leadership Panel Discussion: Leading the Family Business to Achieve Multi-Generational Engagement

Panelists: Drew Everett, current Chair of the Board of Directors
Sarah Nuckolls, Family Senate Chair, Bush Brothers' Baked Beans
Steve Landaal, Landaal Packaging

Moderator: Amy Renkert-Thomas, Founder and Lead Consultant for Renkert-Thomas Consulting, LLC

In this moderated discussion, the leaders of two business-owning families, including the family behind Bush Brothers (aka Bush's Baked Beans), will discuss how the concept of Vertical Leadership helped them grow and expand their businesses as well their Core Capital. Participants who attended the Vertical Leadership workshop will gain even more understanding of how the Vertical Leadership concepts can help them in their own businesses.

AGENDA

FAMILY COHESION: Mentoring and Coaching: Growing Human Capital

Panelists: Richard Luck, The Luck Companies
Scott Luberto, The Luck Companies

Moderator: Tom Epperson, The Luck Companies

Distinguishing between coaching and mentoring can encourage cohesion throughout all generations of the family. Attendees will hear from a panel of family office members and executives who operate active enterprise with formal coaching and mentoring programs. The panel will discuss how this helps create a path to integrate members across the generations.

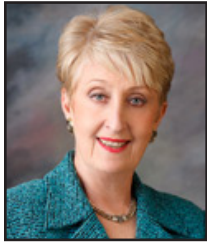
FAMILY LEGACY: Bridging the Generation Gap Through Core Values

Moderator: David R. York, Esq., CPA, York, Howell & Guymon
Susan C. Price, Author

When multi-generations work together on the family's philanthropy, issues sometimes surface because of different points of view held by the younger and the older family members. In this interactive workshop, we'll examine some of the typical issues that arise in families and learn how these diverse groups can build connection, cohesion, and purpose. You'll have an opportunity to try a new tool, Rivets™, to explore shared core values, a key step in fostering communication and connection to achieve your family's goals. Bring your generational dilemmas, and we'll find solutions together.

- 11:15 AM–11:30 AM Break
- 11:30 AM–12:45 PM Closing Presentation “The Art of Vision” with Erik Wahl
- 12:45 PM–1:00 PM Wrap Up by Brian Hughes, Forum Chair, and Greg Raabe, Wellspring Associates

KEYNOTE SPEAKERS



Lee Hausner, Ph.D.

Dr. Hausner, an internationally recognized clinical psychologist and business consultant, provides family consulting services. These services include assisting families in learning effective communication and conflict resolution skills, facilitating family retreats, resolving generational issues and increasing each family member's one to one personal effectiveness. Her facilitation skills and tools provide families the opportunity to support and successfully create long term financial and personal goals.

Dr. Hausner co-founded a nationally recognized consulting group dealing with the unique problems confronting families involved in a family business and/or high net worth families of wealth that became First Foundation Advisors. She incorporated a unique six-step transition model for effective succession of family businesses in the critically acclaimed family business resource book, "Hats Off To You 2...Balancing Roles and Creating Success in Family Business Succession". Previously Dr. Hausner served 19 years as the senior psychologist for the Beverly Hills Unified School District.

Dr. Hausner authored the seminal work regarding wealth and the family, "Children of Paradise...Successful Parenting for Prosperous Families" and co-authored "Homework Without Tears...A Parent's Guide to Motivating Children to do Homework and Succeed in School". She has co-authored with Douglas K. Freeman, J.D., L.L.M., their latest book, "Legacy Families...The Definitive Guide to Creating a Successful Multi-generational Family" and an earlier book "A Founder's Guide to the Family Foundation". Dr. Hausner is a frequent guest on national media and has been a quoted expert in national publications such as The Wall Street Journal, Time, Forbes, Fortune, Town and Country, Privilege, The Robb Report and a contributing writer for Worth magazine. She has been a presenter at the World Economic Forum in Davos, and high net wealth/private client conferences. In addition, she has established a reputation as a well-regarded keynote speaker and seminar leader. She has been a highly-rated resource to YPO, WPO and CEO for the past 17 years.

Dr. Hausner is a graduate of Northwestern University (B.A., Psychology), San Francisco State University (M.A., Psychology), and Kensington University (Ph.D., Psychology).



Andrew Keyt

Andrew Keyt is an internationally known business strategist and succession planning expert for family owned businesses. He has established a reputation globally for his exceptional ability to advise large family owned businesses, resolve family conflict and restore communication. He is one of the few experts called upon in family emergency transitions to help them discover invisible opportunities and solve seemingly impossible problems.

At the age of 22, Andrew became a family business owner of a business he didn't even know existed. "I had to quickly figure out how to fill the shoes of my father and find my own leadership path." His personal story and witnessing the growth and transformation of many successful family business leaders inspired him to write *Myths and Mortals: Family Business Leadership and Succession Planning*, published by Wiley, July 2015. His book is based on years of research and interviews with great next generation leaders like Christine Hefner, Bill Wrigley Jr., Massimo Ferragamo and more. His acute family business insights have been featured in *The Wall Street Journal*, *Chicago Tribune*, *Los Angeles Times*, *Fortune Magazine*, *The Economist* and *Family Business*.

Keyt is the Executive Director at the Loyola University Chicago Family Business Center which is dedicated to helping multigenerational family-owned businesses grow, transition and learn. The Center serves some of the largest family firms in the United States and Canada, approximately 100 member family businesses ranging in size from \$25 million—\$8 billion in annual sales. During Keyt's tenure, the Center has increased its membership by more than 100% and has secured more than \$1 million in pledges to fund future operations.

KEYNOTE SPEAKERS

Keyt is also President and Founder of Keyt Consulting, a private firm that assists family enterprises with succession and strategic planning, dealing with family conflict and communication, working with adult sibling / cousin teams, and executing emergency management transitions. In addition, Keyt is the president of Family Business Network–North America (FBN-NA), the leading network for business-owning families worldwide. Currently FBN International serves over 6000 members in 40+ countries.

Keyt is an acclaimed keynote speaker on family business topics at conferences all around the world including Campden Publishing Families Business Conferences, Family Business Network in Lasusanne, Switzerland and Bogota, Columbia, United States Association of Small Business & Entrepreneurship, FBE Conference, Independent Grocers Association, Cornell University, Crain's Chicago Small Business Forum, Presidents Forum Retreat, ABA National Trust School, Shoe Retailers Association, The Northern Trust Corporation, World President's Organization(WPO), Harris Bank, and Capital Bank & Trust.

Keyt holds a master's degree in family systems theory from Northwestern University with a concentration in family business and an MBA in Family Business with Honors from Kennesaw State University. He is a cum laude graduate of Kenyon College.



Susan Crites Price

Susan Crites Price, a Washington, DC-based writer and speaker, is an expert on family philanthropy. She is the author or co-author of seven books including *Generous Genes: Raising Caring Kids in a Digital Age*, (Majestic Oak Press, 2015), and *The Giving Family: Raising Our Children to Help Others* (Council on Foundations, 2001, revised 2003). Susan is a frequent speaker to groups around the country on the subject of instilling philanthropic values in children.

Susan has been interviewed on “Oprah,” “NBC’s Today,” the CBS “Early Show,” and numerous other television and radio broadcasts and by many newspapers and magazines.

Susan was vice president of the National Center for Family Philanthropy from 2007 to 2011, and prior to that was the managing director of the Family Foundation Services Department at the Council on Foundations.

With her husband Tom, Susan co-authored *The Working Parents Help Book* (Peterson’s, 1994, rev. ed., 1996), a practical guide to juggling kids and careers. It won a Parents’ Choice Award and was a selection of the Scholastic Book Club.

KEYNOTE SPEAKERS



Erik Wahl

Erik Wahl is an internationally recognized graffiti artist, #1 best selling author and entrepreneur. Erik redefines the term “keynote speaker.” Pulling from his history as both a businessman and an artist, he has grown to become one of the most sought after corporate speakers available today. Erik’s on-stage painting seamlessly becomes a visual metaphor to the core of his message, encouraging organizations toward profitability through innovations and superior levels of performance. His list of clients includes AT&T, Disney, London School of Business, Microsoft, FedEx, Exxon Mobil, Ernst & Young, and XPrize; Erik has even been featured as a TED presenter. The responses received have been nothing short of incredible, with standing ovations to prove it.

Erik’s bestselling business book UNTHINK was hailed by Forbes Magazine as THE blueprint to actionable creativity and by Fast Company Magazine as Provocative with a Purpose.

Erik’s understanding of vision was originally born in the school of disappointment. After a eight-year career as a partner in a corporate firm, he became frustrated by the lack of innovative thought and corresponding profits he saw in business. So he set out to challenge companies to change their way of thinking, while simultaneously pursuing his own individual passions. He rediscovered his love for art, and now plays in the business world by working through his art.

In the past 10 years, he has shared his incredible message with the largest and most influential companies in the world, leaving behind his prized artwork as a reminder of his passion for breakthrough thinking. He’s the Warhol of Wall Street, the Renoir of ROI, the Picasso of Productivity, the Jobs of... well, having a Job.



David York

David R. York is a Principal with the Salt Lake City law firm of York Howell and Guymon, where he practices law in the areas of estate planning, tax, business planning, and non-profit entities. He is a Fellow with the American College of Trust and Estate Counsel (ACTEC) and a Member of the Society of Trust and Estate Professionals (STEP). David has been regularly named to Utah Business Magazine’s Utah Legal Elite™ in the field of Estate Planning and as a Mountain States Rising Star in Super Lawyers Magazine.

David loves working with entrepreneurs, closely held businesses, and families of all kinds. In particular, he loves challenging conventional wisdom when it comes to wealth transfer and instead prefers to focus on how to make the most positive, meaningful impact with wealth across generations and in society as is humanly possible.

David currently serves as one of the Founding Directors of Holding Out HELP, which exists to assist those from a polygamous background with the resources necessary to meet their physical, emotional, and educational needs. David also serves on the Board of Directors of Sunshine Heroes Foundation. Sunshine Heroes Foundation’s mission is to improve the health, inspire the spirits, and transform the lives of children around the world.

David lives in Cottonwood Heights, Utah with his wife Mindy and their five children, Emma, John, Samuel, Hudson and Avery. David enjoys cycling and photography of all kinds. He has developed a burgeoning High School senior portrait business, though he’s yet to figure out how to make any money doing so.

FEATURED SPEAKERS



Jill Barber

Jill Barber is a member of CYMI's senior leadership team which provides wealth advisory services to the Mathile Family. Jill transitioned from her position as VP and CFO of CYMI, Ltd., to her current role as Chief Client Service Officer for the Mathile Family Office. Jill's expertise is in financial, tax, estate planning, and risk management.

She joined CYMI, and the Mathile Family Office, in 1999 just one month prior to the sale of the Iams Company to Proctor & Gamble.

Since then, Jill has been involved in hundreds of successful business and philanthropic transactions that have helped the Mathile Family to change the landscape of the Dayton region and several places around the world.

Jill's responsibilities include, but are not limited to, overseeing the tax and estate planning strategies for Family Office clients. The Mathile Family Office is recognized as a leader of best practices for single-family offices and Jill has made reaching this level of excellence possible. She is respected by her peers from Family Offices around the world and is often invited to share best practices on Business Continuity Planning, Risk Management, Strategic Planning, and Family Office Structuring. In 2012, the Dayton Business Journal selected Jill for its prestigious Forty Under 40 award given to future community leaders under the age of 40.

Jill began her career at Arthur Andersen in 1996 and advanced quickly to a tax manager position specializing in S Corporation and Partnership Tax. She was recruited to CYMI in 1999. For more than a decade, Jill has been a trusted advisor to three generations of the Mathile family.

Jill is a Certified Public Accountant (C.P.A.) and a Certified Private Wealth Advisor. She graduated Magna Cum Laude with B.S.B. in Accounting and Finance from Wright State University in 1994. Jill, her husband, and their 2 sons, live in Dayton, Ohio.



Robert M. Boetticher, Sr.

Mr. Boetticher has been honored to have served former U.S. Presidents, former First Ladies, Senators, Congressmen, Cabinet members, business leaders, high-profile entertainers and well-known members of the clergy.

Mr. Boetticher began his career in funeral service in Los Angeles in 1965. He entered the U.S. Army a year later, serving as a supply sergeant and embalmer at the Army mortuary in Frankfurt, Germany. Honorably discharged as a staff sergeant in 1970, he graduated from the California College of Mortuary Science and joined Gates Kingsley & Gates Mortuary in Santa Monica, California. In 1974, Mr. Boetticher purchased four funeral homes and a flower shop in Jackson Hole, Wyoming, where he was elected Teton County Coroner for Teton County, Yellowstone National Park and Teton National Park. He also held offices in many local and state organizations, including the Wyoming Funeral Directors Association where he served two terms as president.

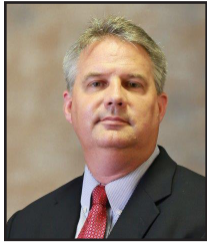
In 1983, Mr. Boetticher rejoined Service Corporation International and relocated to Kansas City, Missouri, where he served in a variety of field operations positions before moving to the company's Houston, Texas headquarters in 1991.

Mr. Boetticher is also Vice-Chairman and CEO of the National Museum of Funeral History, a 35,000 sq. ft. facility located in Houston which houses the country's largest collection of funeral service artifacts. He also serves as Vice-Chairman of the Board of Regents for the Commonwealth Institute of Funeral Service. His expertise in funeral service has led to consulting assignments for numerous films, including *The Gangs of New York* and *A Woman of Independent Means*. His television credits include work on *Six Feet Under*, *The History Channel* and the *Discovery Channel*.

His professional accreditations include mortuary licenses in the State of Texas and the State of California, as well as an honorary Doctorate of Human Letters from the Commonwealth Institute of Funeral Service.

Robert and Jarka Boetticher currently reside in Houston and have three children.

FEATURED SPEAKERS



Daniel S. Bowman

Daniel S. Bowman is the Family Office executive for a single family office, serving four generations. The Family Office grew out of the sale of the family's domestic lumber company, the largest privately held building material dealer in the Southeastern United States. The family's investments include domestic and international assets in the building materials, real estate, hospitality and retail industries. Since the sale, the Family Office has grown from operational oversight to assisting the family in creating their vision and developing the associated plans to work towards accomplishing the goal of generational wealth.

As the Family Office executive, his responsibilities include family governance and support, strategic investment and wealth management, operational oversight, and professional services coordination. He serves as an advisor on all family and business boards.

Over the past eight years he was a key contributor in the development and implementation of a formal governance system for the entire family. This foundational work was critical to the recent successful implementation of leadership transfer between generations. He primarily focuses on the transfer of generational wealth through estate planning, asset allocation and private equity investments. He serves as a primary advisor for estate planning coordination between multiple professionals of the four generations. All of the family groups work with him to ensure sound due diligence in evaluation of their private equity investments. He coordinates long term planning related to asset allocation and tax planning.

Prior to joining the family he served as the Director of Finance at the University of South Florida Medical School. He founded and operated a medical transcription service for 10 years. Mr. Bowman holds an M.B.A. in Finance and Information Systems from the University of South Florida (92) and a B.A. in Economics from Emory University (89).

He served his alma mater, Northside Christian School, from 1992 to 2000 as Chairman, and chaired the Finance, Academic, and Technology committees. He continues to serve at Northside Baptist Church, first as a Deacon and now as an Elder from 2000 to present as Chairman, and chaired the Finance, Personnel, and Executive committees.

Dan and his wife Jill have been married for 22 years. They have three children, Luke, Kate, and Hope. Jill practiced law for Carlton, Fields for 8 years and as a partner at James, Hoyer for 7 years.



Donnaldson Brown

An attorney, specializing in trust administration, Donnaldson Brown has served as a family Trustee since 2001 for a set of trusts established by her grandfather, which now serve over eighty members and five generations of her family. She also served for twelve years on the Board of Directors of a family held company, which prior to its dissolution, held ranching, oil and gas and private equity interests.

Prior to her work with the family trusts and business, she practiced general and labor law litigation in New York, followed by ten years working in the film industry. She is also a Kundalini yoga and meditation instructor working with the general population as well as returning veterans coping with symptoms of PTSD. She lives in Brooklyn, New York and Southfield, Massachusetts.

FEATURED SPEAKERS



Merial Currier

Merial Currier is president of a single family office in Denver, Colorado which serves a large, multi-generational family. She is actively involved with family boards and committees focusing on family businesses, governance, generational transition, family education and next generation development.

Prior to 1998, Merial was responsible for managing private banking, trust and investments for a large bank. She was previously a practicing CPA in both Texas and Colorado specializing in the extractive industries, hospitality and financial services. Merial holds a BSBA from the University of Denver. She is a member of the American Institute of Certified Public Accountants and is involved with many not-for-profit organizations.

Merial is a fourth generation Coloradoan and actively manages a ranching, water and oil and gas operation in western Colorado for her own family. She is an avid hiker and biker and enjoys exploring the great outdoors. She is married and has one son.



Toby Dayton

Toby is President & CEO of LinkUp, a leading online job listings platform delivering candidate sourcing solutions and predictive labor market data. LinkUp's candidate sourcing business caters to the largest employers in the U.S. while the company's labor market data business is focused on a range of client segments including asset management firms, hedge funds, and large market data providers.

Prior to joining LinkUp in 2002, Toby was a Senior Associate at Cherry Tree, a specialized investment banking, private equity, and venture development firm in the Twin Cities. Before joining Cherry Tree, Toby helped build two start-up organizations, one a non-profit environmental policy think-tank, and the other a for-profit technology services company. Toby received his MBA from the Carlson School of Management at the University of Minnesota with a concentration in Finance and a B.A. (English Literature) from Skidmore College. He has served on a variety of non-profit boards in Minneapolis, including the Greater Twin Cities United Way, MinnPost, and Midway Contemporary Art.

Having served on the Okabena Board of Directors for nearly two decades, and as Chairman since 2007, Toby has played a significant role in helping lead the Dayton family office through both generational and leadership transitions as well as a strategic growth initiative designed to create a sustainable future for the company.



Ashley Duchossios Joyce

Ashley Duchossios Joyce is President of The Duchossois Family Foundation. She received her bachelor's degree from University of Colorado and her master's from University of Chicago, School of Social Service Administration. She has been involved with the not-for-profit organization, Metropolitan Family Services, for over fifteen years. She is a member of the Board of Directors, is on the Executive Committee, Strategic Issues committee, Capital Campaign Committee and chairs the External Affairs committee. Ashley is a trustee for The Catherine Cook School and is on their Marketing and Communications Committee and the Nominating

Committee. Additionally, she is on the Executive Committee of The Duchossois Family Council and is a board member for The Duchossois Group.

Ashley lives in Chicago with her husband, Michael, and their two sons.

FEATURED SPEAKERS



Kim Duchossios

Kim Duchossois is the chairman of The Duchossois Family Foundation and past president since its inception in 1984. She also serves as a director of The Duchossois Group, a privately held family business headquartered in Chicago. As a member of the University of Chicago Medical Center's Biological Sciences Division Visiting Committee, Kim played a key role in establishing the American Cancer Society's Patient Navigation System (PNS) at the Medical Center. Kim and her family's engagement and support of cancer patients inspired the ACS to roll out PNS throughout the Illinois Division after the Millennium. Kim was engaged as a volunteer in leadership in IL and nationally as a former ACS foundation trustee. In 2011, she received the James Ewing Distinguished Laymen's Award from the Society of Surgical Oncologists. Kim is currently a trustee of the University of Chicago Cancer Research Foundation. An active and engaged community volunteer, Kim is a founding director and past president of the Barrington Area Community Foundation, a trustee of JourneyCare Foundation (palliative, supportive and end-of-life care), founding board member of Impact 100 Chicago and a retired trustee of Washington and Lee University, the alma mater of both her father and son. Kim has had the privilege and enrichment of involvement with several other Chicago metropolitan non-profits. She was named one of the *100 Most Influential Women in Chicago* by Today's Chicago Woman Magazine.

Kim obtained a B.A. in Speech Pathology from Elmhurst College. However, as her primary focus beyond raising her family, Kim has been blessed with a life-long commitment to philanthropy and engaging the next generation. She has three grown children, Jessica (Dominic) Green, Cobey (Erich) Struckmeyer and Tyler (Danielle) Lenczuk, and five grandsons ages 18 months to 8 years. Kim has been a resident of Barrington, Illinois since 1976.



Tom Epperson

Tom works for Luck Companies, a privately-held, for-profit organization that operates one of the largest stone companies in the United States. Tom has supported the organization in a variety of ways over the years, including his role as one of the architects of Luck Companies' cultural transformation. Tom is currently the Senior Director of Human Resources for the company, and is responsible for Leadership Development and Training, Organizational Development, Benefits and Compensation, Associate Relations, and HR Business Partnerships.

Tom is also the Executive Director of InnerWill, a non-profit dedicated to developing better people, braver leaders, and a wiser world through Values Based Leadership. In Tom's role as Executive Director, he oversees the day to day operation of the non-profit, including work supporting social impact, financial sustainability, programs, the client experience, and digital strategy.

Tom has nearly twenty years of experience as an executive coach, facilitator, and speaker, and regularly works with clients to help transform leaders and their organizations. Tom is a certified business coach and has a Doctorate in Leadership from The George Washington University. Tom is currently an adjunct instructor in Virginia Commonwealth Universities' Executive MBA Program.

Tom believes that leadership is a choice, not a title, and that our responsibility as leaders is to make a positive difference in the lives of those around us. Tom balances high expectations of himself and others with relentless optimism about the ability of individuals to make our organizations, families, and communities amazing places to live, work, and grow. Tom believes that leading is a powerful force for good in the world, if we choose to do so; his personal mission in life is to help others develop the skills to make that choice more often than not.

Tom works hard to be a great husband and father; he's married to a strong, creative woman and has two fantastic boys who have taught him that we can learn as much about ourselves and our leadership at home as we can at work.

FEATURED SPEAKERS



Drew Everett

Drew is a fourth generation member of the Bush family. A native of Dandridge, Tennessee, he received degrees in Finance and Production & Operations Management from Virginia Tech.

In the fall of 1993, Drew came to work for the family business. He has developed through many roles throughout his career at Bush Brothers & Company starting in the Information Services Department before transitioning to the Supply Chain and Operations team. As Production Manager, he successfully led the manufacturing population's transition to Condon's Plant—a new production facility at Chestnut Hill which is arguably one of America's finest food processing plants.

He joined the Company's Board of Directors in 2007. In 2008 he was promoted to Director of Human Resources and in 2013 he added Director of Shareholder Relations and was promoted to Vice President. In that capacity he led organizational and employee development of a highly involved, results oriented culture. This same philosophy has guided the activities of the Family to ensure successful transition to the 4th and 5th generation of ownership. Drew was elected Chairman of the Board in June 2015. He is a founding member of the Bush Family Senate, and the Shoebox Private Trust Company Board of Directors where he also chairs the Investment Committee.

Drew lives in Knoxville with his wife, Melissa, and their two sons, Bennett and Cooper.



Frank Fernandez

Frank joined the Foundation in February 2014 to lead and implement the Westside Neighborhood Prosperity Fund, a program designed to contribute to the transformational revitalization and redevelopment of Vine City, English Avenue, Castleberry Hill and other adjacent neighborhoods.

A recognized leader on housing, transportation and economic development issues, Frank served for eight years as the Executive Director of Green Doors, a non-profit group devoted to transforming lives and neighborhoods for people in need in the Austin metro area. Frank has worked extensively to help create housing solutions across the income spectrum. He is the co-founder of HousingWorks, an Austin-based affordable housing advocacy coalition, and served as the chair of the Texas Supportive Housing Coalition. Frank also led the successful 2006 campaign to pass \$55 million in municipal bonds to support affordable housing in Austin. Frank also actively engaged on transportation issues, serving on the Board of Capital Metro, Central Texas' public transit agency. He served as the chair of the agency's Finance & Audit Committee for four years, helping to raise the agency's cash reserve from \$9 million to \$74 million during his tenure. Frank also co-founded and served as chair of the Alliance for Public Transportation, a non-profit group promoting progressive transit initiatives, and is a former board member of CAMPO, the Metropolitan Planning Organization for Central Texas. Prior to joining Green Doors in 2006, Frank served for five years as Deputy Director of PeopleFund, a community development financial institution. He previously worked as a public sector financial analyst for Salomon Smith Barney in New York City, structuring over \$1 billion in financial transactions.

Frank's work has been honored in the Austin community. In 2005, he received the "Vision Award" from Liveable City for his work creating HousingWorks. More recently, Frank received the Non-Profit Leadership award from Austin Under 40, and was Ernst and Young's 2012 Social Entrepreneur of the Year.

Frank, a Florida native, holds a B.A. in Philosophy from Harvard University and an M.P.A. from the LBJ School of Public Affairs at the University of Texas.

He and his wife, Tina are the parents of 11-year old Lucia and 13-year-old Franky.

FEATURED SPEAKERS



Phil Fontana

Phil Fontana is the President of KKP Group LLC. KKP Group is a single family office for the Lehman family, located in Evanston, Illinois. Prior to joining KKP Group, Phil worked in the tax department at Arthur Andersen and as CFO for a family office in Lincolnshire, Illinois.

Phil graduated Magna Cum Laude with a B.S. in Accounting and Summa Cum Laude with a Juris Doctor, both from Northern Illinois University. He lives in Grayslake, Illinois with his wife, Traci, and three children.



Christine B. Franco

Christine Franco is the head of the family office for the Duchossois Family. Christine is Vice President of Strategic Asset Management, a division of The Duchossois Group, Inc. In addition, Christine is Chief Operating Officer, Senior Trust Officer and Treasurer of Travers Trust Company LLC, a private trust company chartered in South Dakota.

Prior to joining Duchossois in 1996, Christine worked at Ernst & Young Chicago as a manager in their tax group. She spent one year abroad in Ernst & Young's Moscow, Russia office.

She received her Masters of Science in Taxation from DePaul University in Chicago in 1997. In 1990, she received her Bachelors of Business Administration in accounting from the University of Wisconsin-Madison.

She is a member of the AICPA and Illinois CPA Society. She sits on the board of Metropolitan Family Services DuPage, a charity that helps keep families together and healthy. She lives in Willow Springs, Illinois (a suburb of Chicago) with her husband, Carlos, and their three daughters, Alexandria, Anastasia and Ava.



Brian Friedman

Brian has over 25 years of experience providing comprehensive philanthropic, estate and business planning to affluent families. He currently holds the designations of Accredited Estate Planner®, Chartered Advisor of Philanthropy®, Chartered Financial Consultant® and Chartered Life Underwriter®. In addition to other community and professional involvement, Brian recently served on the Board of Directors, the Governance Committee, and chaired the Philanthropic Services Committee at The Community Foundation for Greater Atlanta. He also chaired the Advisory Committee for the Philanthropic Advisor Leadership Institute and served

on the Advisory Committee and Grant Review Committee for One Region Atlanta, the Board of Directors for the Atlanta Chapter of the Society of Financial Service Providers, and on the Professional Affiliate Program and Gift Acceptance Committee for CARE USA. Brian is currently in the 2017 Class of Leadership Atlanta. He is an active member of the Atlanta Estate Planning Council and the AALU and a frequent speaker on philanthropic and estate planning topics.

Brian grew up in the Panama Canal Zone in Central America and received his Bachelor's degree in Electrical Engineering and an MBA from the University of Florida. He worked as a Sales Manager for the Southwestern Publishing Company in Nashville, TN before joining his current firm in 1990. He enjoys spending time with his wife Vanessa, a Geography Professor at Kennesaw State University, and his three children. Brian loves experiencing different cultures around the world and, to date, has visited over 50 countries. In addition to his involvement in charitable activities through church and in his community, he enjoys running, mountain biking, reading non-fiction, playing guitar, and writing music.

FEATURED SPEAKERS



Christine Galloway

Christine Galloway retired as President and CEO of Okabena Company in December of 2014 after 21 years of service to a multi-generational family of wealth. While serving as its chief executive, Christine was responsible for leading the development and execution of the company's long-range strategic plan. In addition, she had oversight responsibility for the delivery of fully integrated financial, tax, investment management, and fiduciary services through the parent company, Okabena, and its wholly-owned subsidiaries, Okabena Investment Services, Inc. (RIA), and Boulder Bridge Trust Company (private trust company situated in South Dakota).

Chris is now active as an independent director serving private companies and non-profit organizations.



Leah K. Hemeyer

Leah K. Hemeyer is a 4th generation member of a multigenerational business family in Colorado. She is very involved with her family's governance and education planning. Leah grew up attending retreats and programs designed by her family's education committee, which have focused on family values, history and legacy. She currently serves as an at-large board member on her family's governing board, she has chaired the family's education committee and serves on other family committees, as well.

Professionally, Leah works as a therapist in a primary care practice in Steamboat Springs, Colorado. Her current focus is on the integration of behavioral health services in primary care. Leah has a passion for helping others manage the complexity wealth can bring to life and relationships and, in the future, she hopes to spend more time working with individuals and families of wealth.



Scott L. Hirsch

Scott has been the CFO of the Benida Group LLC for 11 years. Before joining the Benida Group LLC, Scott spent 1 year as the tax manager with Miami Corporation, a Chicago, Illinois based single family office. Scott also spent a total of 7 years with Arthur Andersen LLP and then Deloitte & Touche LLP in the tax division of the Chicago office, working with high net worth families.

Scott is a Chartered Financial Analyst (CFA) charter holder, a Certified Public Accountant (CPA) with a Personal Financial Specialist (PFS) certification licensed in the State of Illinois, and a Certified Financial Planner (CFP®).

Scott holds a Bachelor of Science degree in accountancy from the University of Illinois in Urbana-Champaign, Illinois.

FEATURED SPEAKERS



Roy Jones

As Director of the Cathy Family Office, Roy's primary responsibilities include overseeing the family office team, advising Cathy Family members on investing and giving options and helping mentor Gen 3. Roy also serves as a family and company ambassador in a variety of initiatives inside and outside Chick-fil-A.

Roy has served as Managing Director of three private equity funds and on the Boards of multiple private companies and non-profit entities. He currently serves on the Advisory Committee of TriniD Capital, a hedge fund led by Alan Gotthardt and previously served on the Investment Committee and Advisory Board of Greenspring Associates, a Baltimore-based venture fund that currently manages \$1.8BB of committed capital.

From November 1998 through January 2004 Roy was responsible for the Family Office of Henry F. "Hank" McCamish, where he served as the Chief Investment Officer, Chief Operating Officer and General Counsel of the McCamish Group, L.P., in Atlanta, GA. He also served as the President of McCamish Foundation. The focus was on entrepreneurial investing with all gains being given to Christian, educational and humanitarian causes. Hank empowered Roy to serve on many early stage ministry boards to help secure the best business practices were brought to the ministry field to help aid their long term success, with God's blessing, of course.

Roy practiced law for 14 years in a law firm that he co-founded. His practice was focused on commercial real estate transactions and development, private equity, estate planning, deal structure and finance of complex transactions. For the last several years of his legal career, Roy functioned as primary advisor to several extraordinary families and gained intimate exposure to the inner workings of private companies, successful families, investment strategies and intergenerational planning.

Roy is a Phi Beta Kappa graduate of Washington and Lee University. After several years in business where he led a successful start-up, Roy graduated from Emory University School of Law, with distinction, was awarded Order of the Coif honors and was on the Law Review. In 2000, Roy was admitted to practice before The Supreme Court of the United States of America.

A native Atlantan, Roy married his best friend and college sweetheart, Carter, 39 years ago. They have two grown sons and worship at The Church of the Apostles. Roy currently serves as Chairman of the Foundation Board of Eagle Ranch.



Stephanie Kilroy

Stephanie Kilroy serves in the roles of Director on the Traynor Family Enterprise Board, as well as Director of Family Governance and Human Resources Program Director for the 110-year-old family-owned business. She has worked in the Human Resources Department for six years and previously was in Sales at Haws Corporation. Stephanie has completed the Governing Family Enterprise program at Kellogg School of Management and serves as the Director of the Traynor Family Enterprise Family Council. Along with her brother-in-law Tom White, Stephanie is one of two fourth-generation family members who are active in the daily business operations and

together they strive to maintain, grow and diversify the business for the next generation of family owners of Traynor Family Enterprise.

Haws Corporation was founded in 1906 by Luther Haws, the inventor of the drinking fountain, and has an exclusive license with the Clorox Corporation for the Brita brand in North America. Haws added emergency drench showers and eyewashes to its product mix in the early 1950s and in 2007 launched a custom design and manufacturing business, Haws Integrated, to offer engineered product and service solutions.

In addition to its US headquarters, Haws has manufacturing and assembly facilities in Switzerland, Singapore, and Brazil.

FEATURED SPEAKERS



Steve Landaal

Steve was born in Flint, MI, and is married with 3 grown children; two sons and a daughter. His hobbies include golf, skiing, and scuba diving. Steve founded Landaal packaging systems in 1987, and has been running the company ever since. He is responsible for directing the organization's overall cultural, financial, sales, manufacturing/operations, and administrative policies to ensure high levels of customer satisfaction as well as directing the growth and development of the organization to ensure sustainability into the future.



Martha Lawrence

Martha Lawrence has been with Chick-fil-A for 22 years. She started at Chick-fil-A in 1994 in the Administration Department, where she used her previous property management experience to oversee the use of Truett Cathy's New Smyrna Beach condos. In 1997, Mr. Cathy asked Martha to consider the position as his Executive Administrator. She held this position for 17 years, until Truett's passing in 2014. Since that time, Martha has continued as an Executive Administrator for the Cathy Family Office, where she is leading a project to archive Chick-fil-A and Cathy Family historical memorabilia. She managed the Cows arrival at a new exhibit at the Smithsonian in 2015 and in 2016 the "50 Objects of Atlanta" exhibit for the Atlanta History Center. Martha is also working on design of new museum space for the company's support center in Atlanta in conjunction with the Campus Strategy Team. Martha and her husband, David, have two sons and live in McDonough.



Ashley Caldwell Levi

Ashley Levi is currently working for family businesses that want to create their own Family Council or need non-family Board representation from someone with a family business background. As a Family Council consultant, Ashley works with the Family Council to build governance, promote communication, and manage expectations. She specializes in initiating, organizing and managing Family Council Retreats. She is a former President of the H.G. Hill Family Council and a fourth generation owner of the H.G. Hill Company. A former employee of the H.G. Hill Stores, Mrs. Levi has served the Hill Company for over 16 years on the H.G. Hill Company Board of Directors. The H.G. Hill Company has been a closely-held family business in Middle Tennessee for over 120 years.

Ashley C. Levi is a former member of the Board of Trustees of the Madeira School and is active in educational and civic affairs. Ashley is a strong supporter of Nashville non-profits such as the Frist Center for the Visual Arts and the Friends of Warner Parks. A Nashville native, she is a communicant of St. George's Episcopal Church. Ashley C. Levi is a graduate of The Ensworth School, The Madeira School in McLean, VA, and received her B.A. degree from the University of the South in Sewanee, TN. Married to Joseph Cummings Levi, they are the proud parents of three young children. Ashley enjoys travel, sports, and Charlevoix, MI in her free time.

FEATURED SPEAKERS



Laura Liang

Laura Liang is a Vice President of Operations and Accounting for the Dan L Duncan Family Office and the Chief Grants Officer for the Dan L Duncan Foundation both based in Houston, Texas. Laura has worked in this family office since its formal inception in 2000, and has worked with the family to grow help segregate the family office from the family operating business. Prior to becoming part of the family office, Laura held various roles in the family operating business including Contract Administrator, Distribution Analyst and Manager of Business Development. In 2015 Laura added the role of Chief Grants Officer with the Dan L Duncan Foundation as it begins active grant making in 2016.

In addition to her duties in the Dan L Duncan Family Office, Laura serves on the board of the Private Investor Coalition, and the Advisory Committee for the Southeast Family Office Forum. Laura is a former Advisory Board member for Family Office Exchange.

Laura has taken an active role in her community by serving on the board of Heroes for Children, The Girl Scouts of San Jacinto Council, Lone Star Swim Team, and is a volunteer with her children's boy and girl scout troops, swim team, band, basketball and dance. Laura has an accounting degree from Western Illinois University and lives in Houston, Texas with her husband, four teenage children and their dog.



Scott Luberto

Scott Luberto is a Corporate Trainer for Luck Companies, one of the nation's largest family owned and operated businesses in the aggregates industry.

Scott graduated from Davidson College in 2012, earning a Bachelor of Arts in Political Science and minor in philosophy.

His passion for developing and serving others led him to join Teach for America (TFA), a nonprofit organization with a mission to strengthen the movement for educational equity and excellence. During his time in TFA, Scott taught at Rocky River High School, teaching ninth grade world history. Scott worked diligently to ensure the success of his students, being honored as the Teacher of the Year in 2014.

Scott's achievements in the classroom led to him being selected as an Aspiring Leader Fellow for Charlotte-Mecklenburg Schools, a district of 140,000 students, where he developed the New Teacher Toolkit, a collaborative digital platform to provide tools and development for teachers.

Currently, Scott develops and facilitates Values Based Leadership training for Luck Companies' associates.



Richard Luck

Richard Luck is the Leadership Development Partner at InnerWill & Luck Companies, one of the nation's largest family owned and operated businesses in the aggregates industry. Richard is a fourth generation family member of the nearly 100 year old company and is able to bring a truly unique perspective having grown up in the family business.

Richard's passion in creating opportunities for individuals to recognize and act on their untapped potential is contagious. He has spent his life pursuing this passion, first with Teach for America and most recently with his own entrepreneurial venture, UnBoundRVA—a nonprofit that helps low-income adults reach their fullest potential through entrepreneurship. After two years of leading UnBoundRVA and successfully transitioning its leadership, he was able to make the move to InnerWill & Luck Companies.

FEATURED SPEAKERS

Richard graduated from the Virginia Military Institute in 2012 earning a Bachelor of Arts in Business and Economics and a Minor in Leadership. His accomplishments in his short, professional career have landed him on stages at Tedx Talks, family business conferences around the country and panel discussions at fortune 500 companies.

Over the last decade, Richard has seen his family business transformed through the power of Values Based Leadership (VBL), a philosophy and model that encourages employees to live, work and lead in alignment with their personal core values, principles, beliefs and purpose to in turn, ignite the extraordinary potential in themselves and those around them. As Leadership Development Partner, he now has the pleasure of working with organizations across a variety of different industries to support them as they begin their own VBL journey.



Kiki Mahar

Kiki, along with three of her siblings, is a third generation owner of Tauck, Inc., her family's 90 year old travel company, based in Wilton, Connecticut. In that role she has helped develop and oversee the company's Board of Directors and has established multiple company policies including a Growth and Investment Policy, Family Employment Policy, Shareholder Agreement as well as a system for accountability and decision making. In addition, her family is in the process of implementing a detailed multi-generational governance structure for their family and family business.

Kiki is a member of the Board of Directors of the Tauck Family Foundation and also enjoys volunteering her time with many organizations throughout her community. This is Kiki's second year serving on the SEFOF Advisory Committee and she is grateful for the opportunity.

Kiki, a graduate of St. Lawrence University, resides in Rochester, NY with her husband, Dan, and their five children.



Greg McCann

McCann & Associates is a boutique firm that has worked over the last two decades with family businesses and family enterprises throughout the U.S with a particular focus on helping families develop through vertical leadership development. We collaborate with families to help them with transitions, communication, and overall to make the family's involvement in all its enterprises a benefit for both the business and the enterprise. We help cultivate the commitment to family, the greater trust, values-based decision making, and longer-term thinking that are vital strengths in well run family enterprises.

Greg McCann is the founder, principal and leader of a national family business consulting firm that create workshops, consults, publishes, and generally innovates on issues of importance to family enterprises.

As an author, educator, coach, consultant and speaker, McCann works with family enterprises in the areas of succession, communication, conflict resolution, and with a special emphasis on helping the next generation succeed in both their careers and lives. Greg has coached leaders and executives for nearly 20 years and is certified in Leadership Agility and Myers-Briggs Type Indicator.

McCann is the founder of the Family Enterprise Center at Stetson University, where he led the effort as a professor to develop the nation's second minor and first under-graduate major in Family Enterprise. McCann wrote, *When Your Parents Sign the Paychecks*, that is a part of the Family Enterprise curriculum at Stetson University. Greg published his second book entitled, *Who Do You Think You Are? Aligning your Character and Reputation*.

Greg was also the Director of Stetson's EMBA and helped to redesign it around vertical leadership development and continues to teach in the program.

FEATURED SPEAKERS



Mariann Mihailidis

Mariann Mihailidis serves as Managing Director for Councils at FOX, and in that role, she serves as a strategic advisor and mentor to over 70 family office executives, wealth owners and wealth advisors. Mariann has also been instrumental in supporting and promoting The Center for Policy and Taxation and the Private Investor Coalition. Both groups are involved in lobbying for reform of regulatory, tax and estate laws in Washington D.C. She has spearheaded FOX's Trustee and Beneficiary workshops and the Private Family Trust Company Network and Symposium.

Prior to joining FOX in 1996, Ms. Mihailidis worked in one of America's leading family offices for four years as an accounting manager for the family's investment partnerships and operating companies. And formerly as a tax and estate-planning attorney, she advised clients on strategies related to wealth transfer issues, taxes, and corporate structures. Ms. Mihailidis has served as an executor and trustee, and her fiduciary responsibilities included administrative, legal, and accounting duties of various trusts and estates.

She spent more than six years in public accounting including work as an auditor for Price Waterhouse. Ms. Mihailidis received a Bachelor's Degree in accounting from the University of Notre Dame and a JD from IIT-Kent College of Law.



Joshua Nacht

Joshua Nacht is a steward, scholar, and consultant to family-enterprise systems. He is a married-in, third generation family owner and Board member of Bird Technologies, a 73-year-old company based in Cleveland, OH. Joshua is also a second-generation owner of Riverwalk Associates, a real-estate development and management company based in Edwards, CO. Joshua recently completed his PhD in Organizational Systems at Saybrook University under the guidance of Dennis Jaffe. His dissertation focus was on the role of the Family Champion and rising-generation leadership within the ownership group of family-owned businesses. Joshua

holds a Masters Degree in Psychology from Naropa University, and led wilderness based leadership courses in his early career. Joshua works with business families to develop and sustain their ownership advantage, and is an active contributor to thought development in the field of family-enterprise.



Galen Lee Oelkers

Galen Oelkers was appointed President of The Zeist Company, LLC, a single family office, in 2009 after serving as Chief Operating Officer since 1999. Galen also serves on the Executive Committee of the Daniel Island Company, a Charleston, South Carolina planned community developer, and as Vice President of Investments for The Zeist Foundation, Inc. Prior to Zeist, Galen served in various capacities including principal non-family executive for the Harry Bass family interests in Dallas, Texas. Galen began his career with Arthur Andersen & Co. and subsequently worked for KPMG.

Galen serves on the Board of Trustees and Investment Committee of the Woodruff Arts Center. He previously served on the Board of Directors, Executive Committee and Finance Committee of the Atlanta Symphony Orchestra, a division of the Arts Center. Galen also serves on the Investment Committee of The Community Foundation for Greater Atlanta, Inc. Galen is an independent director and on the investment committees of a private real estate company and a private investment fund. Galen serves on the board of directors of the Georgia Chamber of Commerce, is a member of the Atlanta Rotary Club, and is active in a number of professional and civic organizations.

Galen holds Bachelor of Science in Business and Master of Science in Business degrees from The University of Kansas. Galen is a licensed CPA and Certified Global Management Accountant. Galen is married to the former Lynn Metts of Macon, GA and they have three daughters.

FEATURED SPEAKERS



Wanda Ortwine

As Chief Family Officer and member of the Luck Companies Strategic Leadership Team, Wanda Ortwine leads the Family Office, which supports a multi-generational family and Luck Companies in achieving their vision for the next generation. The Family Office is focused on long-term financial sustainability through thoughtful and comprehensive business ownership and leadership succession plans, estate and tax planning, asset protection, investment strategies, and diversification. One of her key objectives is to preserve the Lucks' values and business interests from generation to generation and build for the future by counseling, educating, and preparing the next generation of Lucks for ownership and leadership of a national company.

Wanda began her career with Luck Companies in 2007. She has over 30 years of experience in working with high net worth families and family owned businesses. Prior to joining Luck Companies, Wanda served as Chief Specialty Practice Officer, Director of Tax Services, and a Board Member at Witt Mares, PLC, a regional CPA firm. As Chief Specialty Practice Officer, she was responsible for managing operations of the tax, financial services, and pension plan design and administration divisions. Wanda is a Certified Public Accountant, and holds a Bachelor of Science in Accounting from Truman State University in Kirksville, Missouri. She earned a Master of Science in Taxation from Arizona State University. She has also obtained a Certificate in Executive Leadership Coaching from Georgetown University.

Professional affiliations for Wanda include membership in the American Institute of Certified Public Accountants, Virginia Society of Certified Public Accountants, Family Firm Institute, Family Business Network, VCU Family Business Forum, George Washington Family Business Forum, and other Family Office Networking Groups.

Wanda was recognized several years as a Virginia Super CPA. She has spoken at numerous events and conferences on personal leadership, family business and family values, family business advising, and strategic philanthropy.

Wanda's community involvement includes past member of the Board of Directors and Secretary for the Central Virginia Chapter of Juvenile Diabetes Research Foundation, past member and Board of Directors-Treasurer for the National Association of Women Business Owners and past member of the Rotary Club of Richmond. She is currently a member of the Board of Directors and Treasurer for the Luck Companies Foundation, Board Member for The Family Firm Institute, and Board Member for UnBoundRVA.



Alicia Philipp

Alicia Philipp is president of the Community Foundation for Greater Atlanta, one of the largest and fastest growing philanthropic service organizations in the country. She joined the Community Foundation in 1977 when its assets were \$7 million. Today, with more than \$920 million in assets, the Community Foundation strengthens the 23-county Atlanta region by providing quality services to donors and innovative leadership on community issues. In 2015, the Community Foundation received \$113 million in gifts from donors and granted out more than \$139 million via 6,800 grants to more than 2,900 nonprofits locally, nationally and abroad.

Philipp's local, regional and national leadership responsibilities include previous service as a board member of the Council on Foundations, the Southeastern Council of Foundations, Independent Sector and the National Center on Family Philanthropy. Honors received include being named to *Georgia Trend's* "100 Most Influential Georgians" list, one of the "100 Most Influential Atlantans" by the *Atlanta Business Chronicle*, the ninth most powerful Atlantan by *Atlanta* magazine and one of 175 "Emory History Makers" by Emory University.

Philipp received a bachelor's degree from Emory University and a master's in business administration from Georgia State University. She lives in Decatur and has two adult children, both of whom live in Europe.

FEATURED SPEAKERS



Jordan Pilot

Jordan Pilot serves as the director of RJJB Family Foundation. She enjoys working with family members to accomplish the organization's mission of "creating positive change in its community and contributing to causes of eternal value." Her favorite part of her role is learning about local non-profit organizations. In 2013, Jordan co-founded Chapel Farm Collection, a retail business based in Fairhope, Alabama, with her mother-in-law and sister-in-law. She graduated from Furman University with a major in Communication Studies. Jordan lives in Tuscaloosa, Alabama, where she raises her two baby girls and supports her husband's ministry as director for Young Life.



Rodney Pilot

Rodney Pilot serves as an Operating Partner of Pilot Catastrophe Services, Inc. and is directly responsible for field operations, management, and collaborating with clients to develop high-level insurance related catastrophe response plans. Founded and based in Mobile, Alabama, Pilot Catastrophe Services is the largest Catastrophe Adjusting Firm in the Nation and provides thousands of adjusters, support staff, and management after natural and man-made disasters across the country. Since Pilot's inception in 1983, Rodney has been involved in every major catastrophe that has occurred in the United States with the Pilot organization.

Residing in Fairhope, Alabama, Rodney is actively involved in several community service organizations providing time and resources to many causes. With two grown sons who now have their own families, Rodney and his wife, Jeanna, place an emphasis on engaging their children and grandchildren in philanthropy and preserving their own legacy of giving through their family foundation.



Amelia Renkert-Thomas

Amelia Renkert-Thomas is the founder and lead consultant for Renkert Thomas Consulting LLC, a consultancy focused on family enterprises—businesses, family offices, trusts, private trust companies, and foundations. Renkert Thomas Consulting specializes in strategy, ownership and governance, bringing together technical expertise, multi-disciplinary training and extensive experience in governance design, business operations and strategy, law, family systems and organizational development.

Amelia co-founded Withers Consulting Group LLC, and prior to opening her consulting practice was a Partner at the international law firm Withers Bergman LLP, where she co-chaired the firm's Family Office Group.

Amelia comes from multi-generational businesses on both sides of her family, and brings perspective gleaned over more than 150 years of family business to her own work with clients. Succeeding her father, Amelia served as President of Ironrock, Inc., a 5th generation family-owned and -managed producer of ceramic tile and thin brick located in Canton, Ohio, from 1990 to 2002. She remains closely involved with Ironrock as a director and officer. Her maternal grandfather founded Fisher Price Toys.

Amelia is the author of *Engaged Ownership: A Guide for Owners of Family Businesses* (Wiley, 2015). She received her B.A. from Yale College, her J.D. from Harvard Law School, and her L.L.M in Taxation from the Case Western Reserve University School of Law.

FEATURED SPEAKERS



H. Jerome Russell, Jr.

H. Jerome Russell moved through the professional ranks of H. J. Russell & Company's construction & real estate development operations to his current position as President of H. J. Russell & Company and Russell New Urban Development, LLC where his focus is on the firm's strategic direction and new business development. He has been involved in the beverage distribution, consumer marketing, banking, construction and development business for over 25 years. Like his father, Herman J. Russell, Jerome has an entrepreneurial flair, a firmly placed future orientation, and a dedication to his community. In 1997, Jerome was named to the Board of Citizens Trust Bank. In 2005, Jerome was named Chairman of the Loan Committee at Citizens Trust Bank. He also serves on the board of H. J. Russell & Company, Concessions International, Metro Atlanta YMCA, Georgia Historical Society and Central Atlanta Progress. He is a member of the Urban Land Institute, Atlanta Rotary, Atlanta Chamber of Commerce the Young President Organization and the 100 Black Men of Atlanta.



Eileen K. Scherberger

Eileen joined Zeist in August, 2000. She is responsible for overseeing the financial activities of the family office and foundation, leading her team to ensure the timeliness, accuracy, and security of the family and foundation's financial information. Her specific duties include estate, gift and income tax planning & tax return filing, budgeting & forecasting, insurance/risk management, banking & finance, interfacing with investment advisors and other outside advisors as well as establishing the policies and procedures and internal controls for the family office and family office clients. Eileen also manages the Human Resource function including payroll, employee benefits, retirement plan administration, and worker's compensation and she designed and maintains the family office website.

Eileen attended Kennesaw State University and simultaneously earned a Bachelor of Business Administration in Accounting and a Bachelor of Science in Psychology. She obtained her CPA license in 1997 and worked as a tax & audit manager in public accounting before joining Zeist. She obtained the Certified Financial Planner (CFP®) designation in 2014 and is currently an active member of the Georgia Society of Certified Public Accountants, Atlanta Estate Planning Council, National Financial Planning Association, and the Senior Management Council of The Family Office Exchange (FOX). Eileen currently serves on the boards of the Atlanta Estate Planning Council and Agape Community Center which is a local nonprofit entity.

Eileen's interests include art, cinema and natural history. She and her husband Joe live in Kennesaw and are both active members of the YMCA and enjoy traveling, hiking, volunteering and spending quality time with family and friends.

FEATURED SPEAKERS



John Stephenson, Jr.

Born and raised in Atlanta, John Stephenson, Jr. was named Director, Strategic Partnerships and Special Projects for Chick-fil-A, Inc. in November of 2015. Stephenson works closely with Chick-fil-A's Executive Committee, Board Members, the Cathy Family Office and the Chick-fil-A Foundation on a variety of issues and initiatives.

Prior to joining Chick-fil-A, Stephenson was President and Chief Executive Officer of Atlanta Hall Management, Inc. In that role, he was responsible for guiding Atlanta's efforts to relocate the National College Football Hall of Fame to downtown Atlanta from South Bend Indiana, leading the project through concept, design, funding, development, and construction of a state-of-the-art, 95,000 square foot attraction, as well as the first full year of operations.

Until joining the Hall of Fame project in 2012, Stephenson was corporate attorney at the law firm of Troutman Sanders. He joined the firm in 2000 and was named a partner in 2007. His practice focused on mergers & acquisitions, corporate governance, public securities, private equity, joint ventures and licensing, including served as counsel to a number of clients in the hospitality, sports and entertainment industry.

Stephenson holds undergraduate and law degrees from the University of Georgia and lives in Atlanta with his wife, Megan, and two children, May and Jack.



Whitney Van Der Hyde

Whitney Van Der Hyde is a 4th generation family member of Perdue Farms. Active in her family, Whitney has served on the Perdue Family Council and currently serves as co-chair of its Education Committee. She is also very involved in her family's philanthropic efforts and has been involved with the family foundation for more than 12 years, serving on its board of directors for the past six. Believing that families can achieve great things together rather than apart, she enjoys helping other families succeed together in business and in philanthropy. Trained in helping the next generation engage in their family's philanthropy, Whitney consults

on this topic and is a frequent speaker in this area. She has an extensive background working in the philanthropic field with non-profits of various sizes. Whitney is an active volunteer in the Richmond, VA area where she lives with her two young children and husband Eric.



Tom White

Tom White serves as Chairman and CEO of Traynor Family Enterprise and Haws Corporation. His twenty year career at Haws includes domestic and international sales as well as operational roles. Tom established family governance in 2007 to secure and grow the business for future generations of family shareholders. An independent Board of Directors was established in 2008 and the business focus shifted to growth and diversification. Tom was promoted to President and CEO in 2010 and became Board Chairman in 2015. He continues to pursue growth across the company to serve the owners and employees for generations to come. He

earned his B.S. in Economics from the U.S. Naval Academy and is one of two fourth generation family members who are active in daily business operations.

Haws Corporation was founded in 1906 by Luther Haws, the inventor of the drinking fountain, and has an exclusive license with the Clorox Corporation for the Brita brand in North America. Haws added emergency drench showers and eyewashes to its product mix in the early 1950s and in 2007 launched a custom design and manufacturing business, Haws Integrated, to offer engineered product and service solutions.

In addition to its US headquarters, Haws has manufacturing and assembly facilities in Switzerland, Singapore, and Brazil.

FEATURED SPEAKERS



Kyle Wright

Kyle Wright is CEO of Stardust, a single family office in New York City and Houston, where he has lead the organization's integrated planning, risk management and portfolio oversight since 2007. Kyle serves as a key advisor to Stardust's philanthropic and social benefit initiatives, Stardust Fund and Stardust Equity. He currently serves on the boards of directors of the Texas Civil Rights Project and Transparentem, and is a member of the Houston Area Council on Human Trafficking and Houston College of Law Clinics Advisory Council. A Texas native, Kyle holds a B.A. in psychology from the University of Texas at Austin and a J.D., cum laude, from Houston College of Law.



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Atlantic Capital Bank, located in Atlanta, GA, was established in 2007 to serve the banking needs of affluent families and their related business interests. Our clients include multi-generational families, middle market and emerging growth companies and top-tier real estate developers. We offer our clients the expertise, capabilities and lending power of a larger financial institution, as well as the hands-on service often only found at community banks. Our bankers' expertise, combined with a passion for service and a deep understanding of our clients' unique needs, is what makes us different.



Bennett Thrasher is the 8th largest CPA firm in Atlanta, providing Tax, Personal Financial Services, Financial Reporting and Assurance, Dispute Resolution and Forensics, Valuation, and Client Accounting Services to clients in Georgia and throughout the United States. Our affiliate firm, BT Wealth Management, provides high-net-worth individuals and families with integrated fee-only wealth management services. Bennett Thrasher has been recognized by Inside Public Accounting as one of the Best of the Best Accounting Firms and by Accounting Today as one of the Best Accounting Firms to Work for in the U.S. Founded in 1980 by Rick Bennett and Ken Thrasher, today Bennett Thrasher has a dedicated, experienced team of 37 Partners and more than 250 Professionals. For more information, please visit www.btcpa.net.



Founded in 2001, Cumberland Trust is an independent trust company that allows clients to retain their own investment advisors. Our focus is on the beneficiaries, their needs and their values rather than managing assets. Headquartered in Nashville, Tennessee, Cumberland Trust has grown into one of the largest independent trust companies in the country serving families across the Southeast. Our sensitive and skillful handling of the issues surrounding trust administration and wealth transfer has provided harmony and continuity for families for more than a decade.



FRC was founded in 1970 and is a full-service forestry consulting firm offering land management, appraisal, technical, and real estate brokerage services to private landowners, institutions, and industry across the US South.

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Dr. Judith Kolva, one of the world's only experts in the psychology and practice of personal history, founded Legacies In Ink, LLC in 2004. She and her team travel worldwide to work with multigenerational high-net-worth families, family businesses, family offices, and wealth advisors to preserve families' true wealth—stories, values, culture, traditions, pride, and hard-learned lessons—in limited edition heirloom books.

Dr. Kolva brings her proprietary model, *StoryPower: Your Hidden Heritage*, to life for a wide variety of audiences. Her talks and workshops are ideal for family meetings, family and company retreats, conferences, and service clubs interested in creating and preserving lasting legacies.

The Greater Fort Lauderdale Chamber of Commerce selected Legacies In Ink as its 2013 *Small Business of the Year*. Company partners give back to the community through Downtown Fort Lauderdale Rotary Club, Women's Executive Club, Broward Women's Alliance, Habitat for Humanity, Stranahan House, and Church By The Sea.



LHT Consulting Group specializes in creating comprehensive funeral and memorial event plans, ultimately coupled with the implementation of services, which commemorate the lives and legacies of distinguished individuals. LHT provides superior development of arrangements far beyond the scope of traditional funeral homes. Whether the memorial will be a private, intimate gathering or an internationally-televised event, our advisors work confidentially with families and their enterprises to create and administer a tribute as unique as the life being honored.



Prudential Financial, Inc. is a worldwide financial leader with a long tradition of serving the public interest. Prudential Financial has approximately 50 million customers. The well-known Rock symbol is an icon of strength, stability, expertise, and innovation that has stood the test of time.



The Ronald Blue & Co. Family Office works solely with family businesses and multi-generational families with net worths in excess of \$25 million. Our goal is to encourage our clients to maintain a balanced life and engage in an intentional planning process, which helps to empower current and future generations to shape and maintain a legacy comprising social, spiritual and financial capital. Although every family and family business is different, our team constantly seeks to understand those characteristics that are common to successful families and employ a process designed to increase the probability of a family effectively transferring their wealth and values to future generations. This approach serves as the foundation for families desiring to use biblical principles to steward, share, and prioritize wealth and helps them create a multi-generational legacy that goes beyond money.

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The Strategic Group of Companies (“SGC”) is a very unique tax mitigation, consulting and investment banking firm with several complimentary business lines. The first operational entity is Strategic 1031 Exchange Advisors (“SEA”) which focuses on acting as a Qualified Intermediary for real estate and personal property exchange transactions. The second operational entity is Strategic Capital Partners (“SCP”), a boutique investment banking firm that focuses on real estate private equity as well as gaining access to capital markets through the development of tax mitigation and operational business strategies that all have a common conceptual purpose: economic sustainability or the continued preservation of environmental resources. Additionally, SCP works within real estate private equity by aligning high-net worth families and investors with best-in-class private and institutional real estate developers and sponsors. SCP offers investments solely through private placement. The third operational entity is Strategic Investment Holdings (“SIH”), the family office for the founding principals of SGC. SIH is the vehicle by which SGC co-invests with other family offices in a wide-array of both real estate and non-real estate ventures.



USI is a leader in insurance brokerage and consulting with more than 140 U.S. offices. Specializing in property and casualty insurance, employee benefits and private client risk services, USI combines its client-centric culture at the local level with leading edge technical resources nationwide. USI’s unique approach integrates robust analytics, deep expertise and hands-on services to deliver economically vetted, highly personalized strategic insurance solutions.



Wellspring Associates is a national asset preservation, wealth transfer and philanthropic planning firm with specialized expertise in life insurance, founded in 1981. We work with families of significant wealth and their advisors in the design, implementation and ongoing management of sophisticated asset preservation, wealth transfer, philanthropic and life insurance planning strategies. For more information, please visit www.wellspringassociates.com or contact: Patti Williams at pwilliams@wellspringassociates.com (404) 924-4012.

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Family Office Matters, LLC
"Creating solutions that matter to your family"

Family Office Matters, LLC (FOM) is a consulting firm whose mission is to assist high net worth individuals and families, who desire to pass on culture and values to future generations. Our unbiased approach and expertise help families with understanding the holistic needs of the family, to include; the family office, the family business or the individual family unit. FOM believes that the most important aspect of any family business or entity is the family itself and that success requires more than just growing assets. Understanding the dynamics at work within family units, across family lines and generations is imperative to developing a foundation upon which to build family trust and a common vision for the future. FOM is committed to creating value for each family we serve; value that optimizes its wealth, strengthens its legacy, and unites multiple generations through shared interest while recognizing their uniqueness. We are committed to creating solutions that matter to your family. For more information please contact Teddie Ussery, CEO of Family Office Matters, LLC, 706-571-9192, tussery@familyofficematters.com.



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McCann and Associates provides services to universities and other audiences, offers family business consulting, and conducts customized workshops for family enterprises. For more information: www.gregmccannspeaks.com and www.mccannfbconsulting.com.

ASSOCIATION PARTNERS



Since 1951, the Community Foundation for Greater Atlanta has been connecting the passions of philanthropists with the purposes of nonprofits doing that work. With 65 years serving the 23-county Atlanta region and a robust team of experts, the Community Foundation manages the behind-the-scenes details, empowering our donors to focus on the joy of giving. The Community Foundation is a top-20 community foundation nationally with \$920 million in current assets and is Georgia's second largest foundation. Through its quality services and innovative leadership on community issues, the Foundation received more than \$113 million from donors in 2015 (unaudited) and distributed more than \$139 million that same year to support nonprofits throughout the region and beyond. In 2016 Charity Navigator named the Community Foundation a four-star rated nonprofit, its top distinction. For more information, visit: cfgreateratlanta.org or connect with the Foundation via Facebook, LinkedIn and Twitter.



The Jewish Federation of Greater Atlanta is Atlanta's premier Jewish fundraising organization, offering community members the best opportunity to make a positive difference in the lives of Jews everywhere. Founded in 1906, the Federation creates and supports programs that transform Jewish values into tangible deeds, aiding the most vulnerable, ensuring that Jewish culture and traditions live on, and strengthening the critical link between our local community and Jews in Israel and elsewhere overseas. For more information, please visit www.jewishatlanta.org.



The Southeastern Council of Foundations is the region's premier membership association of grant makers, offering networking, education, and advocacy to strengthen the field of philanthropy. For more information, please visit www.secf.org or contact Jaci Bertrand, Director of Member Engagement, 404-524-0911.





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