SEFOF

SOUTHEASTERN
FAMILY OFFICE FORUM

Impactful Strategies for Smooth Transitions Aligning the Family and Family Enterprise

September 25-27, 2017

Georgia Tech Hotel &
Conference Center
Atlanta, Georgia

ADVISORY AND EXECUTIVE COMMITTEE

Advisory Committee

Brian Adams
Sirrom Partners

Dan Bowman, Chair Elect
Tibbetts Holdings

Merial I. Currier
Gates Capital Management

Ashley Duchossois Joyce
The Duchossois Family Foundation

Christine B. Franco
Chinquapin Trust Company

Anne Jones, Chair
Sim Foods

Roy Jones
Cathy Family Office

Gailen Krug
Albourne Partners

Colleen Ritzau Leth
Tauck, Inc

Laura Liang
Enterprise Products Co.

Mark Longnecker
Southern Champion Tray

Bryn Mars
Foster Holdings

Kristen Martin
Love's Truck Stops

Wanda Ortwine
Luck Companies

Pam Rollins
Rollins Inc.

Executive Committee

Brian Hughes, Chair
Hughes Growth Strategies

Anne Jones
Sim Foods

Jim Kane
USI

Dwayne Marshall
Southeastern Council of Foundations

Galen Oelkers
The Zeist Company

Greg Raabe
Wellspring Associates

Gina Teresi
Commercial Insurance Consultants

Teddie Ussery
Family Office Matters

SUB-COMMITTEES

Keynote Sub-Committee

Jim Kane, Chair
USI

Brian Hughes
Hughes Growth

Gailen Krug
Albourne Partners

Community Philanthropy Sub-Committee

Brian Friedman, Chair
Wellspring Associates

Walt Deriso
Atlantic Capital Bank

Dwayne Marshall
Southeastern Council on Foundations

Participant Experience Sub-Committee

Claire Kluever, Co-Chair
Impact Journeys

Scott Rehmus, Co-Chair
Impact Journeys

Teddie Ussery
Family Office Matters

Chris Galloway
Retired Family Office Executive

Rising Generation Sub-Committee

Gina Teresi, Chair
Commercial Insurance Consultants

Brian Adams
Priam Capital

Colleen Ritzau Leth
Tauck Inc.

Bryn Mars
Foster Holdings

CONFIDENTIALITY & CODE OF ETHICS

SEFOF

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 partners 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, partners 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.

Michael's vision to create a gathering of successful families in a private, safe environment started 7 years ago. We believe that he would be incredibly proud that his legacy, and the impact that SEFOF has had on hundreds of families over the last 6 years, not only continues, but flourishes.

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. He has been part of the leadership of the Forum since 2012 and the Chair of the Forum since 2015. Brian has worked with hundreds of successful families and private foundations over his career and has been committed to helping families identify and solve the issues that matter most. Brian's firm, Hughes Growth Strategies, educates, trains and coaches advisors on how to engage families around these critical issues, and support their efforts to create trusted, intimate relationships that deliver results.

After spending nearly 30 years as an accomplished executive in the family office and wealth management industry, Brian launched Hughes Growth Strategies, a consulting firm focused on helping advisors organically grow their firms and create lasting, successful relationships with the right clients. Prior to the launch in 2012, Brian was responsible for building and cultivating family and private foundation relationships at two privately held multi-family offices, 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 family office and impact investing and wealth management programs around the country, including the Wealth & Giving Forum, Impact Capitalism, RayLign's Family Frontiers, the Family Wealth Alliance Advisor Forum, the Family Firm Institute Annual Meeting, the Family Office Symposium, Schwab IMPACT, and CFA Society of Philadelphia Private Wealth Forum. Brian holds a BS from the University of Tampa and completed the Private Wealth Management Program at the Wharton School, University of Pennsylvania. Brian and his wife Carey have two young children and reside in a Northwest suburb of Philadelphia.

AGENDA

MONDAY, SEPTEMBER 25

7:30 AM – 8:00 AM	**Pre-conference Registration (separate registration required)**
8:00 AM – 11:30 AM	**Pre-conference Workshop**
11:00 AM – 1:00 PM	**Registration**
11:30 AM – 1:00 PM	**Pre-Forum Welcome & Lunch** Enjoy a buffet-style lunch while you connect with friends and colleagues, old and new.
12:30 PM – 1:00 PM	**Newcomer Orientation** Participants are invited to learn more about SEFOF and to meet the Forum organizers, some long-time attendees and fellow first-timers.
1:00 PM – 1:20 PM	**Formal Kickoff, Welcome and Overview** Welcome! We will launch the 2017 Forum by getting to know SEFOF and each other. You will make the connections that will serve as the foundation for out time together over the next two days.
1:20 PM – 2:45 PM	**Keynote Address: Joseph Astrachan, PhD** ***Cohesion, Family Strategy, and other Lessons From Dynastic Families*** Family offices that do not pay attention to the inner workings of the owning family often witness the splintering of the family and the disintegration of great accumulated wealth, which threatens the office's very existence. A critical concern is how to keep the owning family healthy and supportive of the goals of preserving and building wealth. Based on 35 years of experience with and research on family offices and family business as well as recently completed research on dynastic families, this session covers what every family office leader needs to know to maintain family health in ways that strengthen the family while aligning family members with wealth, business, community and greater family aims. Family strategy, building family cohesion, and the importance of values and goal fit will be among the topics covered during this presentation and discussion.
2:45 PM – 3:00 PM	**Transition to breakout sessions**

AGENDA

3:00 PM – 4:30 PM **Concurrent Tracks—Session I**

<u>FAMILY OFFICE A</u>

Family Office 101

Moderator: **Bryn Mars, Bryn Mars Consulting**

Panelists: **Stan Van Wyk, Pella Corporation**
Wendy Rogers, Griffin Family Investments

There is an adage that "if you know one family, you know one family," and although the same can be said about a Family Office, there are some underlying elements that are used by many lasting family enterprises. This session is perfect for those who are embarking on their journey of setting up a family office. Hear directly from Family Office executives on best practices for starting a family office, including, but not limited to: defining different types of offices, learning about typical services provided, hiring key team members, the role of the family, and cost considerations. Attendees will guide the conversation with their questions, ensuring a provocative and engaging session.

<u>FAMILY OFFICE B</u>

Family Office: Hidden Security Risks and Solutions for Families and Family Enterprises

Moderator: **Kristin Martin, Loves Travel Stops & Country Stores Inc**

Panelists: **Rob Gray, Cox Enterprises**
Jordan Arnold, K2 Intelligence
Nicki Colosi Trilling, Commercial Insurance Consultants
David Hubbard, AIG

In this session, our panel of family office and security experts will discuss how to uncover hidden risks that threaten our family's security and reputation. Case studies and best practices will be shared for building a security strategy for families, family offices, and family owned businesses. Best practices will include strategies for reducing identity theft, protecting digital assets, and increasing awareness of cyber and travel security threats. Panel discussions will include ideas for developing a social media code of conduct, crisis communication plans, and tools to prevent, restore or mitigate impaired reputation.

AGENDA

FAMILY BUSINESS

Leadership Transitions: Strategies to Foster Long Term Alignment of Business and Family Goals

Panelist: **Dan Bowman, Tibbetts Family Holding Co.**
David Martin, Foster Family Office
Kyle Hooker, Tibbetts Family

Active family enterprises continuously deal with the tension of changing leadership. How a family enterprise transitions through these critical changes is fundamental to the long-term success of the family and its business. Leadership transitions present themselves in multiple ways—generational, professional, lines of business, technological, market driven and more. In this panel discussion, family business leaders with different perspectives will explore what worked and potential landmines to avoid. As family enterprises continually evolve, having a process to implement best practices is key to long-term success of leadership transitions.

FAMILY CONNECTION

Culture Eats Strategy for Breakfast: Engaging in a discussion around the importance of Culture, Character, & Leadership in Your Family Enterprise

Facilitators: **Dr. Tom Epperson, InnerWill**
Greg McCann, McCann & Associates
Shep Haw, Capital Square Realty Advisors

Multi-generational families grapple with the complex, rapidly changing, interdependent world that families and their enterprises live in. This will be an interactive session in which participants will discuss how to strengthen the leaders' reputation and character through leadership development as well as how to develop and nurture the Family Enterprise's values, legacy, and character. We will focus on real world examples, including two different family enterprises' journeys developing their values, legacy, and character. As a part of the session each participant will receive a workbook that allows for self-reflection, an application of concepts and an Action Plan to start your family's purposeful practice.

AGENDA

FAMILY LEGACY

Retaining the Founder's Vision While Allowing for the Next Gen's Influence

Moderator: **Ashley Duchossois Joyce, The Duchossois Family Foundation**

Panelists: **Kelly Nowlin, Surdna Foundation**
Isabel Griffith

Hear from two family members (5th and 6th generation) that are celebrating their 100th anniversary of their family foundation. This session will look at the ways in which the Surdna family works to create effective communication with almost 500 family members. Kelly is a trustee on the foundation board and also is the Chairperson for the Family's communication division. Isabel is currently in college and has been working with her foundation since she was 15 years old.

4:30 PM – 5:30 PM **Unscheduled time to connect and reconnect**

5:30 PM **Departure for dinner at Fox Theatre**

6:00 PM – 9:00 PM **Dinner at Fox Theatre**

Buses to depart for return to Georgia Tech between 8:45 PM and 9:15 PM.

9:30 PM **Rising Gen Social in Small Ballroom**

Continued conversations in conference center Club Room and Lobby Bar

TUESDAY, SEPTEMBER 26

7:15 AM – 8:15 AM **Breakfast**

8:15 AM – 8:30 AM **Opening Remarks**

AGENDA

8:30 AM – 9:30 AM **Keynote Address (Plenary):**

Successful Place-Based Philanthropy: The Before, During, and After and Lessons Learned Along the Way

Moderator: Alicia Phillip, Community Foundation for Greater Atlanta

Panelists: Tene Traylor, Kendeda Foundation
Dena Kimball, Kendeda Foundation
Rodney Bullard, Chick-fil-A Foundation
Lillian Giornelli, CF Foundation/Cousins Foundation/Nonami Foundation

In this panel, representatives from three prominent Atlanta families will share how they are using their family philanthropy to support innovative and bold initiatives creating long-lasting, positive change in Atlanta. Specifically, the panel will discuss a new community project called the Grove Park Initiative in comparison to East Lake, a nationally-recognized urban revitalization project. The panelists will share lessons learned on how to launch and sustain placed-based initiatives with lasting impact.

9:30 AM – 10:00 AM **Break**

10:00 AM – 11:30 AM **Concurrent Tracks/Site visit—Session II**

FAMILY OFFICE

Family Office 201

Moderator: Wanda Ortwine, Luck Companies

Panelists: David Martin, Foster Family
Jeff Lambert, RDV Corporation
Galen Oelkers, The Zeist Company

Family offices start, evolve, and change over time as the needs of the family change. In this session, come prepared to hear powerful stories of how family offices have responded to crises, unexpected needs, and family dynamics, as a normal part of their work. in addition, these families will discuss how they are being proactive and progressive with industry leading education and development programs for all generations. See firsthand how family offices today are taking a holistic view of their services that cover family, wellbeing, wealth, and legacy.

AGENDA

FAMILY BUSINESS

Ownership Transitions: Strategies for Transfers to the Next Generation—What Worked and What Didn't

Moderator: Amelia Renkert-Thomas, Renkert Thomas Consulting

Panelists: Robin Tauck, Tauck Inc.
Liz Tauck Walters, Tauck, Inc.

Family businesses have employed a variety of strategies to transfer ownership over generations, each of which has its advantages and disadvantages, some of which may not surface until many years after the original transfer. All raise perennial questions: What's fair? How do we organize ownership to support the business? How do we organize ownership to promote family engagement? What about taxes? Should ownership be limited to family members who work in the business? What are the benefits and drawbacks of using voting and non-voting shares? In this session, a panel of family business owners will discuss their experiences with different ownership transfer strategies. We will invite audience questions and participation.

FAMILY CONNECTION

Show Your Family You Care: An Investment in Family Culture and Connections

Facilitators: Sylvester Taylor, Center for Creative Leadership
Greg McCann, McCann & Associates

This session will be an interactive, facilitated workshop utilizing the Family Enterprise Sustainability Index, a survey that assesses family connection through 4 aspects: family emotional connection, family financial connection, business emotional connection, and business financial connection. Participants will engage in a facilitated process, applying the cutting-edge research of Dr. Joseph Astrachan and Dr. Torsten Piper. During the session, all participants will process individual results, determine recommended next steps through an Action Plan, and write reflective follow-up letters to be mailed back to them in 60 days. In addition, a workbook with the session's content as well as several exercises will be provided to help apply core concepts to family enterprises during and after the session. Given the nature of this session, it is recommended that participants consider attending with other SEFOF attendees from their family.

AGENDA

<u>FAMILY LEGACY</u>

Investing in Play—A Key to Building a Lasting Legacy

Moderator: Danielle York, 21/64

Panelists: **Staci Brill, Brill Charitable Trust**
Bryn Mars, Bryn Mars Consulting

The work of enterprising families can be serious business, and this interactive session is designed to help you learn more about and leverage an often overlooked, yet powerful, practice to build a family legacy: Play. Play is more than just fun and games. Neuroscience has proven that play relaxes our brain and leads to better problem solving. It can "generate optimism, foster empathy and promote a sense of belonging and community" according to researcher Bob Fagan who has been observing play in animals and humans for decades. These are key traits of successful families and it's also good for relationships, as play opens us to clarity, creativity and the ability to communicate in new ways with others. Join us to learn more about how families have invested in the practice of play to build a lasting family legacy and consider what you can do in yours. This will be an interactive "hands-on" session, led by Danielle York, a Director from 21/64.

9:45 AM – 10:00 AM **Bus for Site Visit Boards**

10:00 AM – 1:00 PM **<u>SITE VISIT</u> (lunch provided, pre-registration required)**

A Tour of the Grove Park and East Lake Communities: See Successful Place-Based Philanthropy in Action.

Danny Shoy, East Lake Foundation
Debra Edelson, Grove Park Foundation

As a follow up to the plenary panel, we will visit the Grove Park community, just East of Georgia Tech. The tour will highlight the plight, urban decay, and future promise of this area. In contrast, we will then visit East Lake to see the changes that have come to this Purpose-Built Community since the project was started in 1995. This trip will give you a great opportunity to interact with and learn first-hand from individuals who have been actively involved with these initiatives. Lunch will be provided.

11:30 AM – 1:00 PM **Lunch/Topical discussions**

Buffet lunch served in the foyer; Create your own small group discussion or join a table that will focus on a priority topic to wealthy families.

AGENDA

1:00 PM – 2:00 PM	**Peer Groups** Participate in facilitated small-group dialogue around priority topics determined by SEFOF participants and their families.
2:00 PM – 2:30 PM	**Break/transition to main ballroom**
2:30 PM – 3:30 PM	**Sharing Collective Wisdom (Formerly World Cafe)** We will tap into our collective experience and wisdom through processes that brings forward the most powerful and useful learnings from the peer group conversations.
3:30 PM – 4:30 PM	**Keynote Address: Thayer Willis**
5:00 PM – 6:00 PM	**Unscheduled time to connect and reconnect**
6:00 PM	**Departure for Hosted Dinners**

WEDNESDAY, SEPTEMBER 27

7:15 AM – 8:15 AM	**Breakfast**
8:15 AM – 8:30 AM	**Opening Remarks**
8:30 AM – 10:00 AM	**Concurrent Tracks—Session III**

FAMILY OFFICE

Estate and Business Planning Audits: "There are things we don't know we don't know." ***Donald Rumsfeld, United States Secretary of Defense (2001-2006)***

Moderators: Dennis Wright, Wellspring Associates
Mariann Mihailidis, Family Office Exchange

Panelists: Marcia Taylor, Bennett International Group
Grant Brooker, Bennett International Group
Wade Etheridge, Pride Investment Partners, LLC

Families and family offices have worked diligently to craft estate and business plans. After all, the goals are important: family unity, values and legacy, continued success of the business, and philanthropy. You know there is an estate plan. You know there is a business plan. This panel discussion explores what wasn't known and why it mattered.

AGENDA

FAMILY BUSINESS

Business Transitions: Maintaining Family Cohesion When Market Forces Drive Changes in the Business

Panelists: **Tom White, Traynor Family Enterprise/Haws Corporation**
William A. Cranshaw
Roy Jones, Cathy Family Office

When we think of a family businesses in transition, we often think of the passing of ownership or operational leadership from one generation to another. In this session, we will consider transitions that are driven by external changes in the marketplace; transitions that every business faces whether private or public. New technology, globalization, channels to market, and competitor behavior may require a family business to adapt not only for growth and success, but for its very survival. We will also address the communication and consensus required of an owning family in order to understand the need to pivot and support their board and management team through that transition.

FAMILY CONNECTION

Digging Deep: Enhancing Connection Through Authentic Communication

Moderator: **Christine Franco, Chinquapin Trust Company**

Panelists: **Henry Brown, Miller Electric Company**
Wendy Rogers, Griffin Family Investments

This session will involve a real-life case study with members of a family enterprise who found that creating a safe environment and encouraging vulnerability led to a deeper level of truth, stronger trust, and greater connection within their family. Through a shared discussion, we will explore why communication and family connection are vital to the success and sustainability of an enterprise as well as how the head can get in the way of the heart. Participants will gain tools to more effectively understand and overcome the challenges of enhancing family connection and learn innovative ways to cultivate an environment that fosters deeper, more open conversations.

AGENDA

FAMILY LEGACY A

De-mystifying Impact Investing and Using It to Further Your Family Legacy

Moderator: **John LaFleur, Strategic Philanthropy, Ltd.**

Panelists: **Alex Hokanson, Threshold Group**
Mark Crosswell, Community Foundation for Greater Atlanta
Scott Rehmus, Impact Journeys

"Impact Investing" means different things to different audiences. We'll be discussing the basics of what Impact Investments are (including leaving you with a take-away glossary of terms) and the role they can play in executing a family's goals for financial investments, charitable intent and legacy.

FAMILY LEGACY B

Faith and Family Legacy

Moderator: **David Wells, MTD Holdings**

Panelists: **Chris Herschend**
Lee Paris, Wellspring Associates
Jerod Pilot, Pilot Catastrophe Services
Jordan Pilot, Pilot Catastrophe Services
Rusty Griffin, Griffin Family Office

This breakout session will address the importance of faith within our families. The Session will include panelist spanning three generations and will address questions including how does the family pass along the faith of its fathers to future generations; how is faith best modeled in a family; how does your family collectively live its heritage of faith and how does your family work through differing forms of belief as a family grows and diversifies?

10:00 AM – 10:15 AM **Transition to Closing Keynote**

10:15 AM – 11:30 AM **Closing Keynote: John O'Leary**

11:30 AM – 11:45 AM **Wrap Up**

KEYNOTE SPEAKERS

Joseph H. Astrachan, Ph.D.

Joe Astrachan is Wells Fargo Eminent Scholar Chair of Family Business, Professor of Management and Entrepreneurship, and past executive director of the Cox Family Enterprise Center at the Coles College of Business, Kennesaw State University near Atlanta, Georgia, USA. He is also a Faculty Scholar with the Smith Family Business Initiative at Cornell University and a visiting scholar at Witten/Herdecke University (he has also had affiliations with Loyola University Chicago and Wharton).

Dr. Astrachan has received numerous awards for his research and service from family business, entrepreneurship, management, and research-oriented associations including awards form the Family Firm Institute and the Family Business Network International. He is author or coauthor of more than 25 book chapters, 48 scientific publications, and ten books including the much acclaimed *Communication and Conflict in Family Business*, and *Mechanisms to Assure Family Business Cohesion: Guidelines for Family Business Leaders and Their Families*. He is a frequent speaker on the topic having given more than 300 speeches around the globe. Dr. Astrachan is coeditor of the scientific publication the *Journal of Family Business Strategy*, past editor *Family Business Review*.

Dr. Astrachan has over 30 years experience studying and working with family companies and has spoken in over 35 countries. He has served on a total of 16 boards of privately owned family businesses (currently serving on eight) in a variety of industries including: heavy equipment, automotive, restaurants, building materials, food manufacturing, retailing and distribution, commercial and multifamily real estate, and healthcare. Dr. Astrachan comes from a family business background (container and tanker shipping, coal mining and pharmaceuticals). Dr. Astrachan earned his B.A., M.A., M. Phil., and Ph.D. degrees at Yale University.

John O'Leary

As a child, John experienced first hand, the devastating nature of fire which left him burned over 100 percent of his body. He was given less than one percent chance of surviving the first night. His unlikely recovery meant a journey of pain and loss that could have easily been insurmountable. Yet, John chose not only to rise above adversity, but to thrive. As a college graduate, business owner, philanthropist, husband and father, he serves as an amazing beacon of hope, positive change, and bold action.

Challenges—like fire—can be destructive and uncontrollable. They can also spark passion, galvanize teams, inspire change, and forge a truly significant life. We've all been burned. Choose to see yourself and your business through the lens of possibility, a new perspective and the certainty that the best is yet to come.

If you are ready to tackle your challenges without relinquishing the joy of today and the possibility of tomorrow, you have found the right place. Now is the time for you and your organization to boldly step forward.

John O'Leary works with hundreds of organizations to transform today's challenges into a foundation for incredible growth. He's taught businesses key strategies to succeed in any environment. He empowers thousands of individuals around the world to lead fuller, more productive and inspired lives.

KEYNOTE SPEAKERS

Thayer Cheatham Willis

Thayer Cheatham Willis is an internationally acclaimed author, educator, speaker, and leading authority in the area of wealth counseling. She has been a licensed, practicing psychotherapist since 1990, and her primary focus is on facilitating inheritors and their families as they cope with the psychological challenges of wealth. A child of wealth herself, born into the founding family of the multinational Georgia-Pacific Corporation, she brings to her field a unique insider's perspective on contending with family dynamics as they relate to the mental and emotional challenges of wealth. Accredited with an M.A. from the University of Oregon and an M.S.W. from Portland State University, Thayer is a licensed clinical social worker (L.C.S.W.) specializing in wealth-related issues. Thayer offers twenty-five years of experience in a field she helped pioneer and dominates as one of its most prominent, foremost authorities. Working privately with a global client-base, she has helped over 800 inheritors and their families in eight countries and four continents resolve wealth-related family conflicts.

Thayer is the author of *Navigating the Dark Side of Wealth: A Life Guide for Inheritors*, an invaluable introduction for families on the difficult journey to freedom beyond wealth, and *Beyond Gold: True Wealth for Inheritors*, which focuses on how individuals can be responsible with the financial wealth in their lives, keep it in perspective, and be free to take on the tough, rewarding task of enhancing relationships. Thayer has written many articles for *Worth Magazine* and writes a quarterly newsletter, available on her website. She also has been interviewed for top financial publications including *The New York Times*, *The Wall Street Journal*, *Financial Times*, *The Business Journal*, and *Time Magazine*.

SPEAKERS

Jordan Arnold

Jordan Arnold is a senior managing director in K2 Intelligence's New York and Los Angeles offices, and head of the firm's Private Client Services practice. With more than 15 years of investigatory and legal experience, he leads complex engagements on behalf of high-profile and high-net-worth individuals, family offices and their advisors, and private and public entities, as well as financial services and law firms.

At K2 Intelligence, Jordan is frequently called upon to help individuals and families navigate—in real time—critical and sensitive situations, including matters involving extortion, stalking, physical and cyber threats, privacy violations, and travel security. He also leads K2 Intelligence teams that conduct deep background research into close hires, such as household and family office staff, and evaluate counterparties ahead of high-dollar purchases, such as of art and real estate.

For corporate clients, Jordan has directed an array of investigations and incident response assignments, including into allegations of fraud, violations of the Foreign Corrupt Practices Act, theft of trade secrets, insider misconduct, and data breaches.

For both private and business clients, Jordan routinely conducts proactive investigations to develop evidence of corporate and individual wrongdoing, including the use of covert techniques, and provides law enforcement referral and liaison services.

Prior to joining K2 Intelligence, Jordan served as an Assistant District Attorney at the New York County (Manhattan) District Attorney's office. In his final assignment, Jordan led development of and headed the Financial Intelligence Unit, and served as a senior investigative counsel in Major Economic Crimes.

As a prosecutor, Jordan routinely worked with the Major Case Squad of the New York Police Department (NYPD) on some of Manhattan's most sensitive investigations, involving abduction, extortion, stalking, bank robbery, and art crime, including art fraud, as well as thefts committed within the police headquarters, judicial chambers, cultural institutions, and luxury hotels. One of these investigations resulted in the return of a stolen Salvador Dali watercolor, and the conviction of its thief.

Jordan's homicide prosecutions included that of Nicholas Brooks, for the domestic violence murder of Sylvie Cachay at a private club, and a member of the Bloods street gang for an execution-style killing. Also assigned to the Violent Criminal Enterprises Unit, Jordan directed proactive, long-term investigations that dismantled gun and drug trafficking crews.

Jordan was twice recognized by the NYPD for meritorious service and his courtroom work has been quoted by publications including the *New York Times*, *Guardian*, *Wall Street Journal*, *New York Post*, and *New York Daily News*, and covered by CNN, BBC, CNBC, and 48 Hours.

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.

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.

Dan 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. 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).

Staci Covin Brill

Staci Covin Brill is a philanthropic and development consultant with more than 15 years of experience working with numerous higher educational, cultural, social service and religious, and philanthropic organizations.

She began her career in a fundraising consulting firm where her portfolio included campaign feasibility studies, campaign organization, and management for several Atlanta-based organizations including the Truancy Intervention Project, Buckhead Christian Ministry, and the Georgia Shakespeare Festival. She was recruited to serve as the first Development Director for the Children's Museum of Atlanta, then the American Jewish Committee's Atlanta Chapter, and joined The Atlanta Jewish Film Festival as its Associate Director in 2005.

Over the following decade, Staci's professional experience expanded to include leadership succession and retention, volunteer recruitment, next generation engagement, strategic partnerships, and event logistics. Her work as a consultant with family foundations grew as an organic extension of her fundraising career path.

A dynamic presenter and skilled facilitator, Staci enjoys working with the firm's multi-generational clients to identify and achieve their philanthropic goals.

Beyond her professional commitment to the philanthropic and nonprofit sector, Staci takes an active role in her family's foundation and serves on several Boards including the *Emerging Leadership Council* at Children's Healthcare of Atlanta (CHOA) and as the co-Chair of *JFGA's Camping Initiative*. She has also served in leadership roles for *The Children's Museum of Atlanta*, the *Truancy Intervention Project*, *Jewish Federation of Greater Atlanta*, *JScreen* and the MJCCA. Staci has been recognized as one of the *Atlanta Business Chronicle's 40 Under 40*, *the Atlanta Jewish Times 40 Under 40*, and was selected to participate in a leadership mission to Poland and Israel by the Jewish Federation of Greater Atlanta. Staci and her husband, Matt, are alumni of FISHER Flight, a national leadership and philanthropic enrichment program.

A native Atlantan, Staci earned her Bachelors degrees from Columbia University and the Jewish Theological Seminary. She and her husband reside in Sandy Springs with their two young children and red dogs.

SPEAKERS

Grant R. Brooker

Bennett International Group, LLC ("Bennett") is the parent of or manages five separate motor carrier operations: Bennett Motor Express, LLC, Ace Doran Hauling & Rigging Co. (flatbed/heavy haul company, Bennett Truck Transport, LLC (specializing in the transport of manufactured housing, modular units and RVs, Bennett DriveAway (transporter of large vehicles in driveaway mode such as motor homes, concrete pumping trucks, fire trucks, city transit buses, and Class 8 trucks (single or in a decking fashion) and BOSS Crane & Rigging (motor carrier which owns and operates large mobile cranes. Additionally, Bennett has warehousing, logistics, and international freight forwarding/NVOCC operations.

Mr. Brooker is responsible for all legal affairs of the company, including nationwide litigation management, business and contractual transactions, employment law, regulatory compliance, corporate risk management, DOT qualified self-insured programs and the Bennett related captive insurance companies.

Henry K. Brown

Henry K. Brown is the Chief Executive Officer for Miller Electric Company. He is a third-generation CEO of the company, following in the footsteps of his grandfather, H.E. Autrey, his uncle Ron Autrey, and his mother Susan Walden.

A Jacksonville native, he is a graduate of Stetson University where earned a Bachelor of Business Administration and a Masters of Accountancy. He is a Certified Public Accountant (inactive) licensed by the State of Florida. After starting his career in Public Accounting with Deloitte, Henry joined Miller Electric Company in 2001 as the Controller, and moved up through the company as Vice President and later Sr. Vice President of Corporate Operations. He became CEO of the company in 2012.

In addition to his formal education, Henry has significant continuing education in the electrical contracting industry and broader construction industry. He is a graduate of NECA's Executive Management Institute (EMI), and formerly a Certified Construction Industry Financial Professional (CCIFP) and Construction Risk and Insurance Specialist (CRIS).

As CEO, Henry's primary responsibilities include fostering a culture that aligns with the core values of the company and implementing strategy to position the company for long term success. He works with other members of the management team on business development and industry relations, and stays involved with every major client and project.

In addition to his work at the company, Henry is involved in a variety of community and industry organizations. He is currently Vice President of the Board of Trustees of Jacksonville Country Day School; Vice Chairman of the Executive Advisory Board for JU's Davis College of Business; a member of the JAX Chamber Board of Directors; a member of United Way's Board of Directors; a member of the Jacksonville Civic Council; a member of the Board of Directors of NECA's North Florida Chapter; and a member of YPO.

SPEAKERS

Rodney Bullard

Rodney Bullard is Vice President of Community Affairs at Chick-fil-A, Inc. and Executive Director of the Chick-fil-A Foundation. Since 2011, he has led the company's community engagement and philanthropic strategy, which is focused on fostering youth and furthering education nationwide. Prior to Chick-fil-A, Rodney served as an Assistant United States Attorney for The U. S. Department of Justice, where he spent several years as a trial lawyer prosecuting criminal cases and received the Director's Award, one of the department's highest honors, from the U. S. Attorney General. In addition, Rodney is a veteran and a former White House Fellow, the nation's most esteemed public service Fellowship.

Passionate about youth and education, Rodney is a member of several boards that mirror his values, including The Salvation Army National Advisory Board of Directors and Junior Achievement USA Board of Directors. He also serves as a director on many other boards, including the University of Georgia's Terry College of Business, Leadership Atlanta, Westside Future Fund, City of Refuge, Emory Center for Ethics and Endeavor Atlanta.

Rodney graduated from the U.S. Air Force Academy with a bachelor's degree in legal studies and earned his Juris Doctor from Duke University School of Law. He received his master's degree in business administration from Terry College of Business. Rodney also is an alumnus of the Harvard Business School's Advanced Management Program.

In 2016, Rodney participated in the Presidential Leadership Scholar program. That same year, he received the Duke Law Alumni Association's Young Alumni Award. Rodney also has participated in Leadership Georgia (2015) and Leadership Atlanta (2012) and has been recognized by several "40 under 40" lists. He is a proud native of Atlanta, where he resides with his wife and son. Beyond his professional life, Rodney enjoys hot yoga, studying history and traveling.

William O. Cranshaw

Bill has spent his career working as an advisor to family-owned enterprises. He began this work at the First National Bank of Chicago (now JP Morgan Chase) where he managed the Closely Held Business Group. In this role, Bill was responsible for the management of all closely held interests and served on the Boards of several family-owned businesses.

In 1988 Bill affiliated with Management Planning, Inc. (MPI), a leading Princeton, NJ based valuation and financial advisory firm that was founded in 1939. Bill embarked on a successful 26-year career at MPI, which included leadership roles in the management and governance of the business. He acted as a "trusted advisor" to his family business clients, specializing in ownership succession, corporate finance, gift and estate tax planning and family business governance issues while often speaking and writing on these topics.

Bill has been actively involved with his own family's business, The Vermont Country Store (VCS) in Manchester, VT where he has served as a Director since 1995. In 2002, Bill was asked to serve as the Trustee for the family trust, which owns the business and has been responsible for developing and executing the governance structures for the Orton family. Bill was deeply engaged in the successful transition of ownership between generations. In his role as a Trustee and VCS Director, Bill is responsible for Board development and advises on VCS executive compensation and corporate development. Bill also serves as the Chairman of the Orton Family Council.

Bill earned an MBA in Finance and Accounting from the Simon School at the University of Rochester and a BA from Washington & Lee University. He is a member of the Family Firm Institute and the Attorneys for Family-Held Enterprises (AFHE)

SPEAKERS

C. Mark Crosswell

Mark Crosswell leads the Foundation's social impact initiative and development of an impact fund, designed to accelerate the pace of impact investing in Atlanta by connecting capital to causes we care about. Prior to this, Mark was with Points of Light, where he led strategy and venture development for the Civic Accelerator which trains, scales and invests in innovative social ventures from around the country. With a background in banking, corporate finance and M&A, Mark is an entrepreneur at heart and has started, invested in, and managed numerous businesses.

With passions for youth development, education and the environment, Mark has been active in the non-profit community in Atlanta for decades. In his spare time, Mark enjoys backpacking, trail running, biking, skiing, fishing, and coaching youth sports. Mark graduated from UNC-Chapel Hill and he and his family live in Sandy Springs, GA.

Debra Edelson

Debra is the Executive Director and Board Member of the newly launched Grove Park Foundation, which recently emerged as the new community development organization spun off from the Emerald Corridor Foundation which she also lead. She was previously a Senior Program Director for the Trust for Public Land (TPL) where she managed the Georgia Office's greenspace and conservation programs, including the Proctor Creek Greenway and Chattahoochee River protection work, and assembled some of the Beltline parks. Prior to that, she directed the Real Estate program for Atlanta Habitat for Humanity. Debra resided in NYC for many years where she launched the iconic NYC High Line park while employed by CSX Corporation. Previous to that she held a post in the New York City Mayor's Office, and two years with the City of New York's Economic Development Corporation. Debra serves on the Board of Directors of the South Fork Conservancy, and completed six years of service as a Planning Commissioner in Dekalb County, GA. She holds a Master's degree in Urban Planning from New York University and a B.A. in Urban Studies from Barnard College, Columbia University

Dr. Thomas Epperson

Tom works for Luck Companies, one of the largest family owned 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 President of InnerWill, a leadership institute started by Luck dedicated to developing better people, braver leaders, and a wiser world through Values Based Leadership. InnerWill works with for-profit and non-profit clients on leadership development, cultural transformation, and executive coaching.

Tom has over 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 is married with two children and lives in Richmond, Virginia.

SPEAKERS

J. Wade Etheredge

J. Wade Etheredge is an accomplished executive with a dynamic background in business administration, operations and financial management. He served in a CFO-COO capacity with multiple rapid growth companies as a results driven leader. Executive positions include Lee & Ryan, Inc. and Chesapeake Construction, LLC as well as working at Citi Group.

Wade is currently the Family Office Executive and Chief Investment Officer for Pride Investment Partners, LLC in Indianapolis providing executive leadership for five office staff. He started the family office after the family's liquidity event in 2012. Having served in a CFO-COO capacity, he moved to the personal side after the sale. Activities include financial and operational oversight of residual business entities in addition to tax planning, investment oversight, risk management and estate planning for family members.

Christine Franco

Christine Franco recently joined Chinquapin Trust Company as its Chief Executive Officer. She also serves on the board of directors of the company. Located in Kansas City, Missouri, Chinquapin provides a full array of services to its clients including comprehensive wealth management, financial, tax and estate planning, investment planning and management, philanthropic planning and fiduciary services.

Prior to joining Chinquapin, Christine spent 20 years with The Duchossois Group and served as head of the family office for the Duchossois family and well as Chief Operating Officer, Senior Trust Officer and Treasurer of Travers Trust Company. Prior to entering the family office industry, Christine was a tax manager at Ernst & Young in Chicago where she spent a year in its Moscow, Russia office.

Ms. Franco is a CPA and is a member of the AICPA and the Illinois Society of CPAs. She graduated with a Bachelor of Business Administration degree in Accountancy from the University of Wisconsin in Madison as well as her Masters of Science degree in Taxation from DePaul University.

Christine resides in Kansas City, Missouri with her husband and three daughters.

Lillian Giornelli

A native of Atlanta, Mrs. Giornelli earned a B.A. degree in History from Dartmouth College in 1982 and a Juris Doctor Summa cum laude degree from the University of Georgia in 1988. Lillian is married to Greg Giornelli and has four children. Lillian C. Giornelli practiced law in Atlanta, Georgia prior to assuming her role and responsibilities in the family's business. Lillian now serves as President of CF Foundation, Inc., The Cousins Foundation, Inc., Nonami Foundation and Nonami, LLC. In these positions, Lillian has the responsibility of overseeing many of her family's foundations and investment ventures. The primary focus of these foundations encompasses investments, homelessness, cradle-to-college education and religion. Lillian also serves on the board of directors for the East Lake Foundation, Cousins Properties Inc., Drew Charter School, J.M. Tull Foundation and The Better Angels Society.

SPEAKERS

Robert Gray

Currently, Rob Gray is the Senior Director of Executive Security Programs and Operations for Cox Enterprises which includes management of the protection of the Cox Family Office and business executives worldwide. Responsibilities include executive protection, protective intelligence, physical security & operations, investigations, risk mitigation, enterprise business continuity programs and disaster recovery.

Previously, Gray was the Director of Global Security for Novelis Inc. Duties included managerial oversight for global physical security, executive protection, business intelligence and threat assessment and crisis management. Gray manages a staff with international responsibilities and duties regarding regional specific operations. This role included the creation and formation of the international security department.

Formerly, Gray was the Director of International Security and Government Initiatives for Western Union. In his role as Director of International Security and Government Initiatives for Western Union, Gray was responsible for an international staff and combating international fraud, money laundering schemes, and government/law enforcement liaison. Gray managed the emerging trends in the money wire industry and identified these trends utilizing current consumer fraud schemes and money laundering practices that manipulate the Western Union, Vigo, and Orlandi Valuta money transfer services. Other duties included executive protection, physical security assessments, and due diligence.

Western Union completed a spin off from its parent company First Data Corporation and he previously was Director of Corporate Security and Director of the Bank Investigation Group (BIG) at First Data. Before joining First Data, Gray served as a Special Agent for the United States Secret Service for 10 years ending as a program manager for an International Financial Crimes program. Gray has served in undercover roles for international terrorism and financial investigations as well as the Public Information Officer for Media Relations and protective intelligence roles. Gray was also a police officer for six and a half years outside of Chicago, specializing in gang intervention.

Gray earned his BA and MA from North Central College, Naperville, IL in Business and Futures Analysis respectively.

R. A. Griffin, Jr.

R.A. (Rusty) Griffin, Jr. is the former Chairman and Chief Executive Officer of Griffin L.L.C. (a joint venture with DuPont) of Valdosta, Georgia, a global manufacturer of crop protection & specialty chemicals which was founded in 1935. Rusty was born and reared in Valdosta, Georgia, and he received a B.S. degree from the University of Georgia with a major in Agriculture and a minor in Business in 1966. Rusty served for six (6) years in the Air Force Reserves.

When Rusty's father died in 1970, he became President and Chief Executive Officer (at age 26) of a family owned business. He was instrumental in transferring the company from a distributor of agricultural chemicals operating in three southeastern states to a basic manufacturer of a line of branded agricultural chemicals operating in virtually every major agricultural market in the United States and over 80 foreign countries. The Business formed a Joint Venture with Dupont in 1998. In November 2003 Griffin Corporation sold its interest in the Joint Venture to DuPont.

Rusty received the Valdosta-Lowndes County Agribusiness Man of the Year Award and the William LaRue Award for outstanding service to the Southern Agricultural Chemical Association and the agricultural chemical industry. He is a graduate of the International Business Fellows Program and a participant of Leadership Georgia. He received Outstanding Member of the year award in 1995 and 2011 by The Valdosta & Lowndes County Chamber of Commerce.

SPEAKERS

Isabel Griffith

My name is Isabel Griffith, and I am a senior at the University of Pennsylvania majoring in Health and Societies with a concentration in public health along with a minor in Hispanic Studies. In the future, I hope to go into the global health field with a focus on maternal and child health and the Latin American region. I have always been fascinated by the health of vulnerable populations and finding ways to promote population health as a means to build up populations and even countries. I am also a member of the Andrus family and have participated in my family's philanthropic initiatives since the age of 14. Through these initiatives, I have gained a deeper understanding of the world of social justice philanthropy, learned essential professional skills, and developed immensely on a personal and human level.

J. Sheppard Haw Ill

Sheppard Haw is a Managing Director at Capital Square Realty Advisors, which sponsors tax advantaged real estate programs for investors. Shep spent 15 years in health care administration at the NCI-designated Massey Cancer Center and at VCU's MCV Hospitals. Prior to that he served in account management with a southeastern advertising agency. He began his career at his alma mater, Hampden-Sydney College, first serving as Director of News and Information and later as Assistant to the President.

Shep earned an M.B.A. from Duke University, a Bachelor of Arts from Hampden-Sydney College, and a graduate degree in Real Estate and Urban Land Development from the VCU School of Business. He has a professional interest in real estate and non-profit institutions. He and his wife, Cynthia, have been involved in ownership and management of commercial real estate for more than thirty years. Besides working at non-profit institutions in the early part of his career, Shep has also served as a volunteer for various non-profits. He and his wife have most recently served Clemson University's Office of Student Affairs in a leadership role. Their two children are Clemson graduates.

Shep and Cynthia reside in Richmond, Virginia, but try to spend their weekends in the quiet of Bath County, Virginia.

Chris Herschend

Chris HChris Herschend is Vice Chairman of Herschend Enterprises, the largest family-owned themed attractions company in the US. Separately, Chris is also the majority owner and President of Ride The Ducks International, the world's largest operator and licensor of amphibious sightseeing tours with 7 locations across the United States & Guam.

In addition to their operating business, the Herschend family invests together through Covenant Capital, LP and gives together through The Neighbor Company; both designed to help the family meet its primary objective of staying "Family Held Forever."

Chris has been elected by the shareholders to serve on the Herschend board of directors since 1997 and has served on the board's audit, compensation, and governance committees. Earlier in his career, Chris worked for Coca-Cola, Cox Communications, and an Atlanta venture capital firm. He earned both his BA (1995) and MBA (2003) from Emory University in Atlanta.

Chris & his wife Ashley have four children and live in Atlanta. His current & past affiliations include the International Association of Amusement Parks & Attractions (IAAPA), Young Presidents Organization (YPO), Ungerboeck Software International, Whitefield Academy, The Church of the Apostles (Atlanta), and Passion City Church.

SPEAKERS

Alex Hokanson

Alex focuses on asset allocation and risk management as well as research on global equities, real asset and alternative investment strategies. Prior to joining Threshold Group, Alex spent ten years at SEI Investments in a variety of roles. Most recently he spent the last three and a half years in investment research and due diligence with SEI's Alternative Investments team. At SEI, he covered the universes of long/short equity managers, global macro managers and liquid alternatives strategies. He was also involved in the development of quantitative risk management processes and hedge fund asset allocation methodologies.

Previously, Alex was responsible for leading SEI's portfolio implementation team which included building SEI's liability driven investing (LDI) business and overseeing SEI's derivative trading activities. In a previous role, Alex was a Trader/ Analyst on the portfolio implementation team which managed SEI's portfolio completion and hedging activities.

Alex earned a Bachelor of Science degree from Villanova University and a Master of Science degree in Financial Engineering from Temple University. He is also a Chartered Financial Analyst (CFA) and a certified Financial Risk Manager (FRM).

Kyle D. Hooker

Kyle is one of nine G3 members of the Tibbetts Family, who sold their 57 year-old privately-held lumber business (Cox Lumber Co.) purchased by his late grandfather Linton N. Tibbetts, OBE in 1949, based out of St. Petersburg, Florida, to a subsidiary of The Home Depot in 2006. In 2009 Kyle helped spearhead the effort to have the Family's 5-year non-compete agreement waived and co-founded a new lumber company (Tibbetts Lumber Co. LLC) based out of the former St. Petersburg headquarters. Kyle is currently the only Tibbetts Family member employed by the family's businesses and his primary responsibilities include serving as executive chairman of Cox Lumber Ltd. and Tibbetts Lumber Co. (the Family's two lumber businesses in the Cayman Islands and Florida respectively), chairman of Village Square Ltd. (the Family's grocery and real estate entity), co-manager of the Tibbetts Family real estate holding company, serves on the board of the Tibbetts Family Office, and is a past chair of the Tibbetts Family Council. In addition, Kyle also has management and oversight of most Tibbetts Family real estate, investments, development projects, government and industry relations, and operating business entities in the Cayman Islands and the U.S.

Kyle has also reached outside the Tibbetts Family as a partner in several Tennessee private equity ventures specializing in real estate brokerage, residential development and new home construction, and commercial property development and management. Kyle also serves as vice chairman of the Board of Trustees of The Episcopal School of Knoxville, is a director of Cayman Brac Power & Light Utility Company, and has served on various non-profit boards.

Kyle spends much of his work life in Florida and the Cayman Islands but his home is in Knoxville, Tennessee with his wife and three children. Kyle played baseball at the University of Kentucky, then transferred and holds a B.A. in Business Management from Maryville College (TN), will graduate in December 2017 with a MBA from the Haslam College of Business at the University of Tennessee, Knoxville, and holds a commercial pilots license. Kyle spends his free time snow skiing, boating, scuba diving, and coaching his kids in baseball and soccer.

SPEAKERS

David R. Hubbard

Mr. Hubbard is Vice President, Marketing for AIG Private Client Group in Los Angeles. Private Client Group provides innovative insurance products and risk management services exclusively for high net worth and ultra high net worth individuals and family offices. His responsibilities include oversight of the Los Angeles, Southern CA, and Southwest regions, which involves daily interface with insurance brokers, underwriters, and trusted advisors to high net worth individuals and families.

Mr. Hubbard also manages the Family Office practice at AIG Private Client Group, overseeing the national development, distribution and implementation of unique insurance products and personal risk management services for members of family offices, as well as their executive staff. Mr. Hubbard is a certified Continuing Education Trainer in California, where he presents on the subjects of risk management and personal insurance to property and casualty Insurance Brokers, Financial Planners, Certified Public Accountants, and other professional groups.

Prior to joining Private Client Group in 2002, Mr. Hubbard was at Marsh Private Client Services in Los Angeles. During the 16 year period with Marsh & McLennan Companies, he provided sales management, consultation and insurance services to high net worth clients, family offices, and business management clients.

Mr. Hubbard earned a Bachelor of Marketing degree from St. Cloud State University in St. Cloud, MN, and has resided with his family in the Los Angeles area for his entire insurance career. His hobbies and interests include home improvement, hiking and running.

Roy Jones

As Senior 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 as a trustee of the Eagle Ranch Foundation.

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, 40 years ago. They have two grown sons and worship at The Church of the Apostles. Roy leads a weekly mentoring group/bible study with millennial men and also enjoys hiking, shotguns, and cooking on his Big Green Egg.

Ashley Duchossois Joyce

Ashley Duchossois Joyce is President of The Duchossois Family Foundation. She received her Bachelor of Arts from University of Colorado and her Master's degree from University of Chicago, School of Social Service Administration. Ashley has been involved with the not-for-profit organization, Metropolitan Family Services, for over seventeen years. She is a member of the Board of Directors, and serves on their Executive, Strategic Issues, and Capital Campaign Committees and chairs the External Affairs Committee. As a volunteer for The Catherine Cook School, Ashley is a Trustee, Co-chair of the Nominating Committee, and is on the Succession Planning/Strategic Initiatives Committee. As a Director for The Duchossois Group, Inc., she serves on the Compensation, Nominating, and Shareholder Committees. Additionally, she is a member of the Executive Committee for The Duchossois Family Council.

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

Dena Kimball

Dena Kimball is the executive director of The Kendeda Fund. She also oversees the Girls' Rights program.

Before joining The Kendeda Fund in 2014, Dena served as the Vice President of Network Support for Teach For All; the Vice President of Alumni Affairs and the Deputy Vice President of Admissions for Teach for America; and as the Executive Director of GirlVentures in San Francisco, a nonprofit organization with a mission to inspire adolescent girls to develop and express their strengths.

Dena holds a master's degree in public policy from the John F. Kennedy School of Government at Harvard University and a bachelor's degree in political science from Emory University.

As an independent consultant, Dena specialized in the curriculum development, management, strategic planning and development of nonprofit organizations focusing on youth. She has served as an associate director of development for Pacific Crest Outward Bound School and as a program specialist at the National Economic Development and Law Center. She was the founding Chair of American Jewish World Service's Global Circle and sits on the Board of the Directors of the Fugees Family.

Dena lives in Atlanta, Georgia, with her husband and two daughters.

SPEAKERS

Claire Kluever

Claire Kluever is a Co-Founder and Principal of Impact Journeys LLC, a firm dedicated to helping wealthy/enterprise families and advisors in their pursuit to deploy more capital for greater impact. We work alongside families and their wealth advisors to ensure they have access to cutting-edge thinking, best practices, events and communities which support the families in turning their impact goals into a reality. Claire also serves as Principal and CEO of Magnolia Solutions LLC, a firm that offers Professional Coaching and Advising to Wealth Advisors, Wealth Creators and Wealth Inheritors as they effectively navigate business, career and life transitions. Claire's strengths are in guiding and challenging constituent groups towards making decisions, taking action and moving their organization, team, board and/or family forward, in a productive and engaged manner.

Claire built her expertise in family offices and wealth management over 16 years at Family Office Exchange, a research and consulting firm specializing in building family legacy and ensuring "best practices" in family office and wealth management organizations. As a Managing Director, Claire was charged with building and leading the Executive Recruitment department, constructing the Member Development team, and working with families and advisors in the Consulting Group. During her tenure, Claire advised and worked alongside family leaders, family office managers and wealth management executives in building service offerings which truly met client needs, educating the next generations, successful recruitment and retention of executive talent, family compensation benchmarking and creating successful cultures and teams.

Claire has served as faculty for Mountain West Family Office Forum, Southeastern Family Office Forum, Inheriting Wisdom's "Building the Family Experience", and the Family Wealth Alliance Fall Forum and Partner's Summit. She has also spoken at The Institute for International Research's Family Office Forum, Institutional Investor's Women in Wealth Seminar, World President's Organization (WPO), Metropolitan Circle, FOX Fall Forum and FOX Wealth Advisor Conference. Claire is a designated Professional Certified Coach (PCC) through the International Coaching Federation and a graduate of the Institute for Professional Excellence in Coaching (iPEC).

John LaFleur

John LaFleur is a Director at Strategic Philanthropy, Ltd. and is responsible for both direct client services and outreach to the advisor community. John brings deep experience in both the non-profit and for profit sectors. He has worked on a wide array of philanthropic initiatives with a particular emphasis on education, homelessness, and the arts. His current clients are involved in major university gifts, the underwriting of several endowed positions to major cultural institutions and the implementation of transformative grants to human service agencies focusing on adoption and human services.

His background includes serving as executive director of one of Boston's largest private family foundations where he launch a number of successful large-scale program related investments and donor collaborations. He's a trustee for an elderly private donor who helped transition her Downtown Boston commercial property to a private foundation which now provides subsidized non-profit office space.

John has a B.S. in Accounting from Bentley University and has served as President of the Edgar Allan Poe Foundation of Boston, founding director of the Edward Gorey House of Cape Cod and board member of Grub Street Writer's Group. He is currently on the board of Side Street Studio Arts of Elgin, IL and Synapse Arts in Chicago. He is also the author of several illustrated storybooks.

SPEAKERS

Jeffrey K. Lambert

Jeffrey K. Lambert is the Chief Financial Officer and Assistant Secretary for RDV Corporation, a multi-generational family office located in Grand Rapids, Michigan. The firm provides comprehensive wealth management, financial, tax and estate planning, investment planning and management, foundation governance and personal administrative services.

Mr. Lambert heads the Services Group of RDV Corporation, which includes Accounting, Talent Services, Technology Services, Risk and Asset Management and Life Long Learning. He is an officer and/or board member on various family entities and committees, including RDV Sports and the Orlando Magic, MVP Sports Clubs, the Operations/Services Committee, and the Lifelong Learning Committee.

Mr. Lambert began his career on the audit staff of KPMG working first in Fort Worth, Texas, and then Boston, Massachusetts. He then served for three years as Controller of Gulf Resources & Chemical Company, a publicly-traded holding company of natural resources and international real estate interests headquartered in Boston.

In 1992, Mr. Lambert relocated to Grand Rapids to join Guardsman Products, Inc., a publicly-traded manufacturer of industrial coatings and consumer products. He served as Director of Finance for four years until the company was sold in 1996.

Following a brief period as Director of Business Risk Assurances and Economic Evaluation for office furniture maker Herman Miller, Mr. Lambert joined RDV Corporation in 1997.

Mr. Lambert is a Certified Public Accountant and earned a *Top Ten* award from the State of Texas for his scores on the CPA exam. He graduated with highest honors from the University of Texas at Arlington, earning a bachelor's of business administration degree in accounting.

He and his wife reside in Ada and have eight grown children between them. Mr. Lambert is the treasurer and serves on the board, the executive and finance committees of Frederik Meijer Gardens & Sculpture Park; the finance committee for Our Daily Bread Ministries; and the Talent Attraction and Retention Committee of the Talent 2025 Initiative. He is also a recently-retired coach for the girls' varsity lacrosse team at Grand Rapids Christian High School.

Bryn Mars

Bryn Mars is thrilled to pair her knowledge of business operations, and the challenges of family enterprise, in a meaningful way. As founder of Bryn Mars Consulting, she focuses on the intersection of business and family, providing structure for governance, leadership, and education, particularly as it relates to succession and the Rising Generation.

After earning her degree in Psychology from Skidmore College, Bryn went on to serve as a high level operations manager, including Chief Operations Officer for a service provider in the NYC area. Though business operations was her first career, Bryn was introduced to her family office at the age of 18, and quickly found an interest and love of the fine line of business and family.

In addition to her own company, Bryn is an active member of the Board of Directors of her family office, and of their newest entity, FAM Legacy Solutions, an MFO Consulting Service. Previously, she served as Chair of 5/4ths, a 4th Generation Foster Family Investment Group.

She is considered a thought leader in the family office space, particularly as it pertains to the Rising Generation, and has been featured as a speaker at countless organizations. She is also on the advisory board for numerous Chicago area organizations, including Family Firm Institute, and Slingshot Fund.

Bryn recognizes the importance of independence as a defining feature of her lifestyle, and uses that value to drive her forward.

SPEAKERS

David M. Martin

David joined the family office for the Foster family in 1981 and was promoted to President in 1991. The family office was formed after the Foster family sold their steel business and decided to continue working together as a family. Today, the Foster family is comprised of seventeen households spanning second through fifth generations. David oversees the family's investments and leads their educational programs, generational planning and philanthropy.

David's charitable activities include: Board of Directors of the Private Investor Coalition, Board of Trustees of the YMCA Retirement Fund, Investment Committee and Finance Committee of the Carnegie Museums of Pittsburgh, Board of Directors of the YMCA of Greater Pittsburgh and the Editorial Advisory Board of *Trusts and Estates* magazine.

Kristin B. Martin

Kristin Martin is Supervisor of the Love Family Office in Oklahoma City, OK. Tom and Judy Love founded Love's Travel Stops & Country Stores, Inc. in 1964. Since this time Love's has grown to more than 410 locations in 40 states and employs approximately 17,000 individuals.

The Love family is very much involved in the day to day operations of the Love's Family of Companies. Generations one through three serve as active employees in the business. The Love Family Office serves the three generations by offering accounting, cash flow management, estate planning, trust administration, foundation administration, real estate management, legal, risk management, governance, education, and tax planning services to the family.

Kristin joined Loves in 2008 serving in the income tax department. In 2011, the Love family decided to formalize the family office. Kristin left the tax department to help launch the Love Family Office and develop and expand the services offered to the Love family.

Prior to joining Loves, Kristin worked in public accounting for seven years. She has also served in different capacities in private industry.

Kristin is a member of the AICPA and the Oklahoma Society of CPAs. She is very active in her community volunteering in the Oklahoma City and Yukon public school systems as well as serving in many different volunteer roles over the years within her church. Kristin has been married for 32 years and is the mother of four children and one daughter in law.

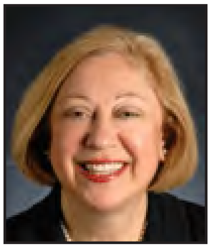
Greg McCann

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 many areas all centered within the context of vertical leadership development. 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*.

SPEAKERS



Mariann Mihailidis

Mariann Mihailidis serves as managing director and consultant to family office members of the Family Office Exchange. In her role she oversees the management of all domestic family office relationships. As a practicing tax and estate-planning attorney, she develops strategies in wealth transfer issues, taxes, and corporate structures. Mariann has served as an executor and trustee, and her fiduciary responsibilities included administrative, legal, and accounting duties of various trusts and estates.

Prior to joining FOX in 1996, Mariann 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.

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

Kelly D. Nowlin

Currently a trustee of the Surdna Foundation, Kelly chairs both the Andrus Family Program and Centennial Working Group. Kelly is responsible for outreach to, and engagement of, nearly 500 extended family members and identifies opportunities to collaborate with other family foundations and youth philanthropy programs. Kelly is guiding the development of activities marking Surdna's 100th anniversary in 2017.

Kelly was a founding board member of the Andrus Family Fund (AFF), an independent grantmaker launched by Surdna in 2000 for fifth generation family members. She helped develop program areas, all governance aspects, and strategic vision of this $4M fund. Kelly served as Vice Chair, then Co-Chair for four years of her seven-year term.

Kelly has nearly 30 years of experience as a media and communications professional, has launched two startups, and has worked extensively with non-profit organizations generating awareness and support for their causes. She is currently a full-time philanthropy and marketing consultant and serves on the boards of Grantmakers for Effective Organizations (GEO) and the National Center for Family Philanthropy (NCFP).

An honors graduate of Boston College (Class of '89), Kelly lives in Hopkinton, Massachusetts with her husband and two teenage children.

SPEAKERS

Galen 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. In related roles, Galen 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, the Board of Directors and Finance Committee of the Atlanta Symphony Orchestra, and the Investment Committee of The Community Foundation for Greater Atlanta, Inc. Galen is an independent director for a private real estate company and a private investment fund. Galen is a director of the Georgia Chamber of Commerce, a member of the Atlanta Rotary Club, and is active in a number of other professional and civic organizations.

Galen earned a Bachelor of Science in Business and Master of Science in Business from the University of Kansas. Galen is a licensed Certified Public Accountant and Certified Global Management Accountant.

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 coaching, 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

Wanda serves as a member of the Board of Directors for the Luck Companies Foundation, UnBoundRVA and InnerWill Leadership Institute.

SPEAKERS

LeRoy H. Paris II (Lee)

Lee serves as Managing Partner of Meadowbrook Capital and is currently serving in Business Development for Wellspring Associates in Atlanta. He has also been Director of Planters Bank and Trust Company and the Mississippi Business Finance Corporation.

He is a graduate of The University of Mississippi and The University of Mississippi School of Law. He is a member of the Mississippi Bar Association.

Lee serves as Deacon of the First Presbyterian Church of Jackson. He is Chairman of the Board for National Center for Fathering and The Mississippi Charitable Foundation. He is a former Director of the Children's Scholarship Fund of Jackson and has served as a Director of The University of Mississippi Alumni Association. He has served as Chairman of Mission Mississippi and as a Director of the Rotary Club of Jackson, The University of Mississippi Foundation and Patrick Morley Ministries and as President of The River Hills Club. He has served as state chairman of the Young Presidents' Organization (YPO), Chairman of YPO's Christian Fellowship Network and also served on the Board of the WPO Rebel Chapter as its Network Coordinator.

Lee resides in Jackson with his wife, Lisa. They have three children and four grandchildren.

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.

Jerod Pilot

Jerod Pilot is in his ninth year on staff with Young Life, an international Christian outreach ministry. He currently serves as the area director in Tuscaloosa, Alabama, where he works with students ranging from middle school to college. Jerod received his Bachelor of Science in Business Administration at Furman University. Jerod holds several leadership positions within Young Life, including an advisory role with Tudor Farms, a Young Life Camp located in Maryland. He also sits on the Associate Board for Alabama Policy Institute. As a third generation family member, Jerod has taken an active role in his family office, helping to spearhead a now-annual cousins' retreat for his generation. He hopes to see the legacy of his grandparents, as well as his parents and aunts and uncles, passed on to his own two young daughters. He also serves on the board for his family's foundation.

SPEAKERS

Scott Rehmus

Scott has made a career developing practical solutions to complex problems and has deep, hands-on experience in making lasting change. Most notably, he spent 13 years building a sustainable future for the 19-million-acre Great Bear Rainforest, first with the Packard Foundation and then co-leading two foundations that partnered with 27 First Nations to use $120M to create thriving communities and a thriving environment. The project won the 2016 Fuller Challenge and was cited as "one of the most extraordinary conservation, social justice, and indigenous rights victories in recent memory".

In 2014, Scott shifted to apply his knowledge and skills to unlock capital for cause, focusing on making it easy for wealthy families to maximize their positive impact by integrating ALL their capital--financial, human, social, physical, etc. To this end, Scott participated in 50+ events as he researched the state of the impact ecosystem, authentically engaging as a sustainable development / collective impact expert, philanthropist, impact investor and/or member of two high net worth families. He has also taken a learn-by-doing approach, engaging in a diversity of projects including: launching the peer learning community, Mountain West Family Office Forum, and the social enterprise startup, GoodX.com; helping high-impact nonprofits, California Forward and Social Impact Exchange, pivot to more diversified funding streams; transforming the finances, culture and governance of his church, St. Andrew's-Wesley United Church; and engaging with his Atlanta- and San Francisco-based families on their individual and collective impact journeys. Throughout his career, Scott has helped create and run transformative peer-to-peer experiences and communities, from small support groups of less than a dozen to impact events of 400+.

Amelia Renkert-Thomas

Amelia Renkert-Thomas is the founder of Engaged Ownership LLC and Renkert Thomas Consulting LLC, and the author of *Engaged Ownership: A Guide for Owners of Family Businesses (Wiley, 2015)*.

Renkert Thomas Consulting LLC is a U.S.-based consultancy focused on family enterprises—businesses, family offices, trusts, private trust companies, and foundations. RTC works with family enterprise owners on issues related to strategy, ownership, and governance. Amelia brings technical expertise, multi-disciplinary training, and extensive experience to governance design; business operations and strategy; law; and family systems and organizational development.

Engaged Ownership LLC is an innovative startup dedicated to the idea that for family enterprise owners, there is more at stake than money. Through the Engagement Toolkit, Engaged Ownership offers training and education to family members, directors, managers, and their advisors, to improve engagement and foster more effective stewardship of family enterprises of all shapes and sizes.

Amelia recently launched Engaged Ownership's new online magazine, MoreatStake.com. More at Stake is dedicated to providing highly relevant materials, articles, and resources to enterprising families and family business advisors.

A tax, trusts and estates attorney by training, Amelia co-founded Withers Consulting Group LLC in 2013, 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.

SPEAKERS

Wendy Rogers

Wendy Rogers was raised in the deep south in Valdosta, Georgia. After earing her International Business degree at the University of Georgia, she spent several years working in different capacities for Fortune 100 and Fortune 500 companies Dow Chemical, DuPont, and Chick-fil-A, Inc. She has served in diverse capacities like sales, market and product development, branding, promotions, supply chain management, and talent development.

Her love of people and learning drives her curiosity and commitment to innovation in people, products, and process. With a group of special women, Wendy helped lead Karama Collection: an innovative non-profit organization that focuses on the restoration of dignity by providing creative and purposeful work for the marginalized in Africa (www.karamacollection.com).

Her most creative role is as mother, homeschool teacher, and door holder for her three daughters. She and her husband, Chuck, are raising their daughters in beautiful Richmond, Virginia. She currently advises and serves on the boards of a couple of non-profit organizations and chairs her family's investment committee and serves on the family foundation. Wendy recently completed an executive program at Northwestern Kellogg School of Management and received a certification in Private Wealth Management at the University of Chicago Booth School of Business.

Daniel J. Shoy, Jr.

Daniel Shoy, Jr. serves as president of the East Lake Foundation. He is responsible for its strategic plan and goal setting focused on its mission of breaking the intergenerational cycle of poverty for children and families in the East Lake community. With overall responsibility for the Foundation's operations and external relations, he is also charged with sustaining strong relationships with the Foundation's partners. Since joining the Foundation as Program Director in 2010, he has also served as Deputy Executive Director and Chief Operating Officer.

Daniel has 20 years of experience in the nonprofit sector with organizations focused on youth and community development. Prior to joining the East Lake Foundation, Daniel worked for The Arthur M. Blank Family Foundation for 10 years and was responsible for awarding $28M in grants.

Daniel has completed several leadership programs including the United Way of Metropolitan Atlanta Volunteer Involvement Program (2002), Southeast Council of Foundations Hull Fellows Program (2003), LEAD Atlanta (2005), Association of Black Foundation Executives Connecting Leaders Program (2008), and the Georgia Partnership for Excellence in Education's Education Policy Fellowship Program (2009).

Daniel currently serves on the boards of the East Lake Housing Corporation, Charles R. Drew Charter School, the University of Georgia Board of Visitors, Hands on Atlanta and on the Atlanta Public Schools' Affordable Housing Taskforce. He previously served on Emory University's Board of Governors. He is a member of Leadership Atlanta (Class of 2017). Daniel has been recognized by Atlanta Tribune as a Man of Distinction (2016) and as one of Georgia Trend Magazine's Notable Georgians (2017). He's been a member of Alpha Phi Alpha Fraternity, Inc. since 1994 and is currently active with its Nu Mu Lambda Chapter.

Daniel is a first generation American from New York City, speaks two other languages and enjoys international travel, sports and photography. He earned a B.A. in History from Emory University in 1995 and in 2013 was named an Emory College Distinguished Alumni.

SPEAKERS

Robin Tauck

Robin is a 3rd generation Owner and past President of Tauck Inc, a 93-year luxury leisure travel business on seven continents. Robin spent her career in the family business developing and marketing land and sea travel to North America, Europe, Africa, China/Asia, Central and South America, India and Middle East. She is currently working with her owner siblings on a Enterprise and Governance Plan for future family stewardship. In addition, Robin is a US Commissioner of UNESCO at the State Department to forge partnerships for the protection of World Heritage Sites; and serves on travel boards such as WTTC and Tourism Cares. She is a board member of two family foundation boards – Tauck Family Foundation and the TRIP Foundation.

Robin is a graduate of University of Cambridge Sustainability Leadership Program, Stanford University Executive Business Program, and University of Vermont B.A. She received UVM's "Legacy of Leadership" Award; and was recently honored in 2015 with the Connecticut Women's Hall of Fame Award for Global Impact.

Marcia G. Taylor

Marcia Taylor is president and chief executive officer of Bennett International Group, which she acquired with her late husband J.D. Garrison in 1974.

For 42 years, Taylor has overseen the company's strategic growth into an international transportation management and supply chain solutions leader with nine primary business lines. Through its affiliated companies, Bennett provides commercial vehicle transport, manufactured housing transport, heavy-haul and specialized freight transportation, logistics, warehousing and distribution services, international freight forwarding, crane, heavy rigging and specialized lifting services, and portable building manufacturing. The company and its entities employs more than 900 office employees, 3,200 independent contractors, and includes about 600 agent offices globally.

In addition to her work at Bennett, Taylor currently serves on several boards, including: Children's Healthcare of Atlanta, United Community Bank Advisory Board, the Council of National Policy, the National Museum of Wildlife Art, and St. John's Hospital. She previously served as board chair for Piedmont Henry Medical Center and on the Executive Board of the Georgia Motor Trucking Association.

Taylor has received numerous recognitions for her professional and civic accomplishments. In 2017 she received the 2016 Horatio Alger Award from the Horatio Alger Association for Distinguished Americans, an Honorary Doctorate of Commerce from Clayton State University, the NDTA National Transportation Winner 2012, Entrepreneur of the Year (Venture Magazine), Industry of the Year (Henry County Chamber of Commerce), and eight consecutive #1 rankings on the Atlanta Business Chronicle's annual Top 25 Women-Owned Business List. In 2014, Taylor was named The Most Influential Woman in Trucking by Women in Trucking and Navistar. Bennett consistently ranks on Top 100 lists published in several industry-related magazines.

Taylor is also CEO of the Taylor Family Foundation, a private family foundation established in 2012. Through this foundation, the family donates a percentage of quarterly profits to nonprofit organizations giving to those in need in communities nationwide.

Taylor is married to Michael K. Taylor. She has three grown children, David Lowry, Danny Lowry, and Lynette Mathis, who all work for the company, seven grandchildren and two great-grandchildren.

SPEAKERS

Sylvester Taylor

Sylvester is a Senior Manager at the Center for Creative Leadership. He leads groups responsible for design and development of new intellectual property, tools, assessments, publications, and other leadership development related products, as well as for enhancing product profitability, innovation, quality, and for existing products.

He has published numerous books, articles, and chapters in scholarly and professional outlets related to leadership development and organizational effectiveness. His most recent book is "Experience Driven Leadership Development: Models, Tools, Best Practices, and Advice for On-the-Job Development", published by John Wiley & Sons in 2013.

Sylvester is a past recipient of the distinguished Scientific Contributions Award given by the Human Resources Division of the Academy of Management. He has served on the Boards of Directors for the University of North Carolina Alumni Association, the Greensboro Montessori School, Noble Academy, Affordable Housing Management, United Child Development Services, and The Association of Mangers of Innovation.

Sylvester graduated from the University of North Carolina at Chapel Hill with a B.S. in Economics and Industrial Relations. He completed Ph.D. level courses at the University of North Carolina at Chapel Hill. He is a past presenter at SEFOF.

Tené Traylor

Tené Traylor joined the Kendeda Fund as a Fund Advisor in March 2016. She oversees the Atlanta program.

Prior to joining the Kendeda Fund, Tené was senior program officer at the Community Foundation for Greater Atlanta. For ten years, she led the Community Foundation's community development and neighborhood transformation grantmaking including the Neighborhood Fund and launched several related programs and initiatives. Tené worked to identify, develop and steward collaborative relationships and resources to amplify the importance of place-based philanthropy, equity and civic leadership.

Tené has spent her career in the nonprofit and philanthropic sector with nearly six years at United Way for Greater Atlanta, then at The Zeist Foundation, Inc. Most recently, she was honored to be named a Georgia Forward Young Gamechanger and a Who's Who in Black Atlanta.

Tené has a Master of Public Administration degree with a concentration in public policy and nonprofit administration from the University of Georgia and a Bachelor of Arts degree in political science from Georgia State University. She is a proud Atlanta native and loves spending time with her family.

SPEAKERS

Nicki Colosi Trilling

Nicki Colosi Trilling, CPCU is a member of Commercial Insurance Consultant's (CIC) consulting team, where she is a Partner in CIC's Private Risk Insurance Advisory (PRIA). PRIA blends personal and commercial property & casualty insurance and risk management expertise to offer tailored solutions to enterprising families, family offices and wealth advisors. She is also Principal Consultant of NJ Gold Coast Marketing, LLC where she helps organizations seize growth opportunities.

As chief architect, founding member, and former Trustee of the Private Risk Management Association (PRMA), Nicki currently serves on the PRMA Education Committee, whose mission is to improve the advice, coverage and service provided to the high net worth insurance consumer. She is also a volunteer for the Southeastern Family Office Forum.

Previously Nicki held senior leadership positions at AIG, PURE and Fireman's Fund Insurance Company with responsibilities in a variety of disciplines including customer service, sales, operations, finance, human resources, distribution management, marketing, pricing and underwriting.

Nicki holds a Bachelor of Arts degree in political science from the State University of New York at Brockport, several property & casualty insurance designations, a certificate in association management and is a Net Promoter® Certified Associate.

Stan Van Wyk

Stan joined Pella Corporation in April of 1996, as the company's Internal Auditor. That was during a period of rapid growth for the company and Stan had the opportunity to serve in many different roles in the Finance Department including: Manager of Financial Accounting (1997 – 2000), Manager of Manufacturing Accounting (2000 – 2001), Pella Division Controller (2001 – 2004), and Director of Business Development (2004 – 2009). In 2009, he moved to his current position as Executive Director of the Family Office.

Upon graduation from Pella High School in 1989, Stan attended Central College in Pella. At Central, he was active in the intramural athletic programs and played on the golf team as a freshman and the basketball team his senior year. He graduated from Central College in 1993, cum laude, with a major in Accounting.

After graduation from Central, Stan accepted an auditor position for the public accounting firm KPMG LLP in Des Moines, IA. During his three years at KPMG, he passed the CPA examination and worked with clients primarily in the manufacturing and distribution industries.

Stan's wife Tari is also a graduate of Central College, and they have three children: son Ryan (18), daughter Lauren (16), and daughter Reagan (13). After their third child, Tari decided to stop teaching pre-school and become a stay-at-home mom. Stan and his family live on Bos Landen golf course in Pella. Stan and Tari enjoy golfing together, traveling, and spending time with their families. Family is a very important part of Stan's life and he enjoys the many activities his children are involved in including basketball, golf, football, volleyball, and soccer. He also enjoys hunting pheasant, deer and turkey.

SPEAKERS

Elizabeth Tauck Walters

Liz is an owner, along with her three siblings, of Tauck Inc., a third-generation family travel business. She currently serves as Shareholder Representative on the company's board of directors.

From 2000 to 2010, Liz was the Managing Director and senior staff person of the Tauck Family Foundation. She currently serves as President of the Tauck Family Foundation, as well as on the boards of the Bainbridge Schools Foundation and the Bainbridge Island Museum of Art.

Liz received a B.A. in Government from Dartmouth College and an MBA from U.C. Berkeley. Her graduate work focused on non-profit management practices and the philanthropic sector. She lives in the Seattle area with her husband and three daughters.

David Wells

David is a Vice President with Woodmont Investment Counsel in Nashville, TN. Prior to joining Woodmont, David was a portfolio manager at Hanson Wells Partners, a long-short hedge fund he co-founded in 2012. Previously, he was a sell-side research analyst at Thompson Research Group and Avondale Partners, covering the industrial and consumer sectors for hedge fund, mutual fund and private equity clients.

An Eagle Scout, David is a magna cum laude graduate of Wake Forest University and has completed executive education course work on family business governance at Northwestern University's Kellogg School of Management. He is a Chartered Financial Analyst (CFA) charter holder. David currently serves as Chairman of the Board of a single family private trust company where he works closely with a multigenerational family on long-term planning. As well, David is as a Board Member at Nashville Classical Charter School, a member of the Board of Traveler's Rest, a Board Member at the Exit Planning Institute's Nashville Chapter, a mentor through Pathways Women's Business Center, and serves as a Deacon at West End Community Church. He was recognized in 2017 as one of Nashville's Forty under Forty.

Tom White

Tom White serves as Chairman and CEO of Traynor Family Enterprise and Haws Corporation. He established family governance in 2007 to secure and grow the business for future generations of family shareholders. The following year, an independent Board of Directors was established and the business focus shifted to growth. 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 operations in Switzerland, Singapore, China, and Brazil.

SPEAKERS

Dennis R. Wright

Dennis is a Managing Director of Wellspring Associates where he leverages over 20 years of experience to assist affluent, multi-generational families, family offices and their advisors. His Wealth Integration™ practice provides clarity and confidence in meeting their personal, business and financial goals. Dennis also maintains a significant presence in the Midwest, coastal Georgia and South Carolina.

Dennis takes pride in building relationships with family offices as well as law, accounting and financial professionals on behalf of their mutual clients. His dedication to multidisciplinary teams is exemplified through work ethic and the breadth of expertise he provides. Dennis commonly leads high-level panel discussions at the annual meetings of the Fiduciary Law Section of the State Bar of Georgia, the Family Office Exchange (FOX) Regional Member meetings, and the Southeastern Family Office Forum.

In addition to his commitment to clients, Dennis is dedicated to furthering his profession. He serves as a member of the Atlanta Estate Planning Council, Savannah Estate Planning Council, the National Association of Estate Planning Councils and the *Thought Leaders Council* of the Family Office Exchange. As a committed member of his community, Dennis has served in various roles for several organizations including Troop Committee Chair with the Boy Scouts of America. He currently serves on the Hilton Head Island Motoring Festival and Concours d'Elegance Board of Directors and is a trained volunteer for CanCare.

Prior to joining Wellspring Associates, Dennis was an executive level manager for GE Medical Systems. He earned a Master of Business Administration from Rockhurst University and a Bachelor of Science with Special Honors from the University of Southern Mississippi.

A native of Terre Haute, Indiana, Dennis resides in Atlanta, Georgia, with his wife, Susan, to whom he has been married for more than 30 years. Dennis and Susan have two sons, Andrew and Austin, who are both proud Eagle Scouts. He and his family are members of Johns Creek Presbyterian Church, where he is an Elder. Dennis is an automobile enthusiast who enjoys restoration and all forms of auto racing.

SPEAKERS

Danielle Oristian York

Danielle Oristian York is a speaker, consultant and trainer working with individuals, families and organizations who seek to change the future through a strategic and operational exploration of values and identity. She is an internationally recognized expert on multigenerational and next generation philanthropy and family decision making.

As managing director of 21/64, a nonprofit practice founded to serve philanthropic and enterprising families, she and her partners develop and train on catalytic tools for transforming how individuals and families articulate values that motivate them and use them as benchmarks for decision making, now and in the future.

Danielle's experience working in wealth management, a family office and the non-profit space has given her different vantage points from which to catalyze and support strategic decision making. With more than 15 years of experience, a constant curiosity and warm presence, new and seasoned philanthropists, family foundations, non-profits and the advisors who serve are drawn to her for as they navigate what is next on their journey. Prior to joining the 21/64 Team, Danielle worked at UBS and Pitcairn Family office. She is married, with two children, and lives on the south shore of Boston.

Education & Affiliations

- Bachelor of Arts, James Madison University
- Postgraduate Program in Bowen Family Systems Theory at the Bowen Center Georgetown
- Member of the Collaboration for Flourishing Families
- Professional Advisors Committee at The Boston Foundation

PREMIUM PARTNERS

American International Group, Inc. (AIG) is a leading international insurance organization serving customers in more than 130 countries and jurisdictions. AIG companies serve commercial, institutional, and individual customers through one of the most extensive worldwide property-casualty networks of any insurer. In addition, AIG companies are leading providers of life insurance and retirement services in the United States. For more information, visit http://www.aig.com/.

Asset Vantage was born out of a family office who recognized the need for integrating financial data and analytics. Our vision is to empower the wealth owners with insightful information as their fingertips, enabling them to make well informed decisions on their investments. Our solution integrates a general ledger allowing our clients to account for, and report on, all asset types regardless of liquidity, location, or currency.

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.

As a nationally recognized CPA and consulting firm, Bennett Thrasher serves our clients and solves their most complex needs. We are among the largest accounting firms in the nation and foster a culture that embraces our core values of integrity, family and clients. Our unique culture enables us to collaborate, which results in significant value for our clients. Specializing in tax, assurance and advisory services, our CPAs and consultants apply their deep subject-matter expertise and industry knowledge to make us Better Together.

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.

PREMIUM PARTNERS

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.

With a proud history of more than 150 years, John Hancock is dedicated to providing thoughtful and innovative insurance solutions designed to help you address a variety of financial planning goals and needs, including protecting your family's well-being and assets, growing your retirement savings, and preserving a legacy for future generations. John Hancock:

- Provides solutions to more than 3.5 million policyholders
- Delivers on its promises with over $2.3 billion in claims paid annually
- Has financial strength ratings that are among the highest in the industry
- Offers a wide range of products through an extensive network of agents, brokers and financial planners across the U.S.

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.

PREMIUM PARTNERS

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.

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.

PREMIUM PARTNERS

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 or contact: Patti Williams at (404) 924-4007.

Wheels Up is a revolutionary membership-based private aviation company that significantly reduces the upfront costs to fly privately, while providing unparalleled flexibility, service and safety. Wheels Up offers guaranteed availability to its private fleet of new Beechcraft King Air 350i and Citation Excel/XLS aircraft to individual, family and corporate members.

EDUCATION PARTNERS

With Special Thanks

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

McCann & Associates

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.


See you at the next Forum...
SEFOF
SOUTHEASTERN
FAMILY OFFICE FORUM