SEFOF

BUILDING THE DNA OF YOUR FAMILY ENTERPRISE THROUGH INNOVATION, COLLABORATION & CULTURE

SEPTEMBER 23-25, 2019
9TH ANNUAL FORUM
GEORGIA TECH HOTEL & CONFERENCE CENTER

Inside front cover

Do not print - blank page

Inside back cover

Do not print - blank page

OUR PURPOSE

Few issues are of greater importance than perpetuating a family's values, heritage, philanthropic activities, wealth and inter-generational relationships… but success requires thoughtful, proactive planning. The purpose of the Southeastern Family Office Forum (the "Forum") is to create a peer-to peer educational and networking opportunity in a safe, academic environment for families of significant wealth. Staffed by scholars, industry experts and family members, the Forum provides thought leadership and insight into a variety of issues through a highly interactive, thought provoking format.

Attendance is for qualified attendees. Our program is open to families and family enterprises and/or their executives.

CONFIDENTIALITY & CODE OF ETHICS

Open communications, sharing of experiences, and networking are key to the success of SEFOF participants and greatly enhance their 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 SEFOF code of conduct, attendees are expected to adhere to a strict no solicitation policy. Violation of this Code of Conduct will result in the immediate dismissal of the attendee with no refund of registration.

MICHAEL BRINK

FOUNDER

Michael Brink, 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.

BRIAN HUGHES

PRESIDENT & FOUNDER, HUGHES GROWTH STRATEGIES, LLC

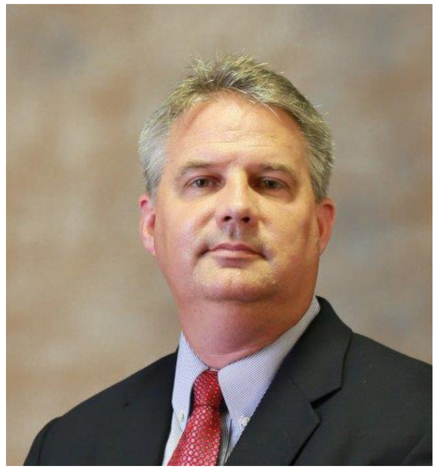
Brian has been involved in the Southeastern Family Office Forum since the founder and good friend, the late Michael Brink, discussed the idea of creating a peer to peer network for successful families in the Southeast. He has been part of the leadership of the Forum since 2012 and the Chair of the Forum 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 multifamily 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, wealth management and impact investing 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.

EXECUTIVE COMMITTEE

BRIAN HUGHES

HUGHES GROWTH STRATEGIES



DANIEL BOWMAN

TIBBETTS HOLDINGS

CHRISTINE GALLOWAY

RETIRED CEO OKABENA COMPANY

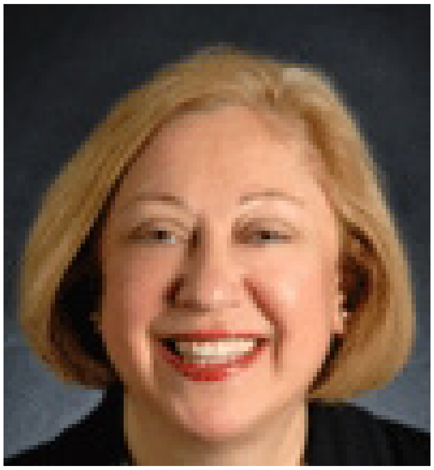
WENDY GRIFFIN ROGERS

THE SIGNATRY

JIM KANE

USI, INC.

COMMITTEE MEMBERS



MARIANN MIHAILIDIS

M2 CONNECTIONS, LLC

GALEN OELKERS

THE ZEIST COMPANY, LLC.

WANDA ORTWINE

LUCK FAMILY OFFICE

GREG RAABE

WELLSPRING ASSOCIATES

TEDDIE USSERY

FAMILY OFFICE MATTERS

ADVISORY COMMITTEE

WANDA ORTWINE, CHAIR
LUCK FAMILY OFFICE

BRYN MARS, CHAIR ELECT
FOSTER HOLDINGS

MERIAL CURRIER
GATES CAPITAL

DANE HARBAUGH
GATES CAPITAL

ANNE JONES
SIMMONS FOODS, INC.

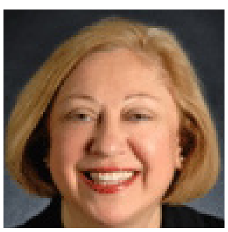
ROY JONES
SEVEN HILLS STRATEGIES, LLC

GAILEN KRUG
ALBOURNE

KIKI MAHAR
TAUCK, INC.

GRAHAM PECK
COATTAILS, LLC

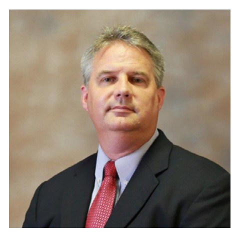
TRACK LEADERS



MARIANN MIHAILIDIS
FAMILY OFFICE TRACK

AMY RENKERT-THOMAS
FAMILY BUSINESS TRACK

WENDY GRIFFIN ROGERS
FAMILY CONNECTION & LEGACY TRACK



DANIEL BOWMAN
NEXT GEN TRACK

AUSTIN MCDONALD
NEXT GEN TRACK

COMMITTEE MEMBERS

KEYNOTE SUB-COMMITTEE

GREG RAABE, CHAIR

WELLSPRING ASSOCIATES

ROY JONES

SEVEN HILLS STRATEGIES, LLC

JIM KANE

USI, INC.

WANDA ORTWINE

LUCK FAMILY OFFICE

PEER GROUP SUB-COMMITTEE

MERIAL CURRIER, CHAIR

GATES CAPITAL

ANNE JONES

SIMMONS FOODS, INC.

STEVE SMITHERMAN

THE FAMILY PRIVATE TRUST, LLC

GAILEN KRUG

ALBOURNE

KIKI MAHAR

TAUCK, INC.

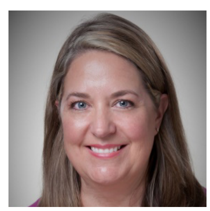
PARTICIPANT EXPERIENCE SUB-COMMITTEE

DANIELLE YORK, CHAIR

21/64

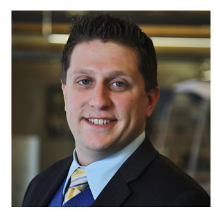
BRIAN ADAMS

SIRROM PARTNERS



CHRISTINE FRANCO

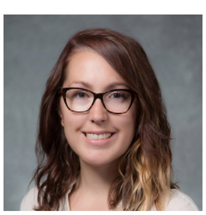
CHINQUAPIN TRUST COMPANY



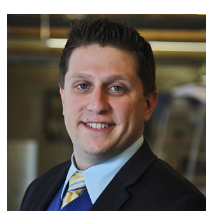
GRAHAM PECK

COATTAILS, LLC

TECHNOLOGY SUB-COMMITTEE

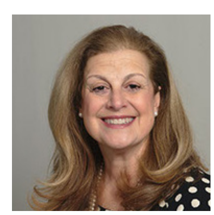


RACHAEL DEELEY, CHAIR



GRAHAM PECK

COATTAILS, LLC



NICKI TRILLING

COMMERCIAL INSURANCE CONSULTANTS

9/23 MONDAY MORNING

7:30 AM–8:00 AM Pre-Conference Workshop Registration

8:00 AM–11:30 AM Pre-Conference Workshop

Designing and Professionalizing the Family Office

Presented By: Family Office Exchange: Charles B. Grace III

Conference Room A

11:00 AM–1:00 PM Registration

11:30 AM–1:00 PM Pre-Forum Welcome Luncheon

12:15 PM–12:45 PM Newcomer Orientation

Conference Room A

Welcome to SEFOF! If you are attending SEFOF for the first time join us for the New Attendee Orientation where you'll meet Forum Organizers, SEFOF Alumni and fellow first-time attendees. We welcome you into the fold and in this short session we will share tips about how to get the most out of SEFOF. The orientation also provides you with the opportunity to mingle with other new attendees and get your questions answered by the experts.

1:00 PM–1:20 PM Forum Kickoff, Welcome & Overview

Christine Galloway, Program Emcee

1:20 PM–2:30 PM Keynote Address

The Culture of Independence Isn't All It's Cut Out To Be: The Six-Step Process To Healthy Family Independence

Speaker: Tom Rogerson

2:30 PM–3:00 PM Keynote Reflection

Join your peers for a discussion of the keynote at your table. What big ideas were presented? What takeaways will you share with your family or colleagues?

3:00 PM–3:30 PM Break

MONDAY MORNING KEYNOTE

THOMAS C. ROGERSON

As a recognized leader and pioneer in family governance throughout the world, Tom uses his "Six Steps to Healthy Family Governance" to assist families with communication, philanthropic vision, legacy planning, succession and education. Tom incorporates these critical issues into a client's comprehensive wealth management plan, not only helping to prepare the money for the family, but to also prepare the family for the money. He brings more than three decades of experience to the wealth management industry where he has provided guidance and education to families, helping them transition significant capital, both financial and human, from one generation to the next. He has run Family Governance/Legacy Meetings for more than 200 families from around the world, over ten of which are "Forbes 400" Families.

Prior to starting his private practice Tom was with Wilmington Trust, bringing his wealth management expertise as both a speaker and motivator to not only families but to Wilmington's client facing teams, helping them integrate Family Governance into the fabric of the client relationship, from introduction to full implementation. He created unique messaging called WISE (Wealth Insights Shared Effectively) to motivate prospects, centers of influence, clients, and internal teams towards his integrated approach in managing family wealth. Previously, Tom was Managing Director of Family Wealth Services for BNY Mellon, National Director of Estate Tax Planning with State Street Global Advisors in Boston, and Director of Financial and Estate Tax Planning with Coopers and Lybrand. He holds a bachelor's in Economics from Ithaca College.

Tom is a much sought after international speaker on the topic of family governance for wealthy individuals, family offices and entrepreneurs. Engagements include: The Young Presidents Organization, The World Presidents Organization, Harvard University Business School, Tiger 21, Babson College, The Lincoln Center, Yale University, Dallas Theological Seminary, Vistage, Penn State Black School of Business, Museum of Modern Art, The Nature Conservancy, New York Botanical Garden, The Dallas Foundation, The New York Community Trust, The Boston Foundation, as well as many other organizations.

The Culture of Independence Isn't All It's Cut Out To Be: The Six-Step Process To Healthy Family Interdependence

Within a family's culture, Tom Rogerson refers to the trend of "hyper-individualism" as "independence to the point of estrangement." The goal of this session is to unearth why "hyper-individualism" is occurring within high net worth families and to explore the effects of this trend on family cohesion, business succession, and wealth preservation. Affluent families often miss the importance of setting the right "family culture" until problems arise. Yet the consequences of the wrong culture have the highest lasting negative effect on their spouses, significant others, and their children. Building a culture of family "interdependence" and of "working together" can be threatening to wealth creators who sometimes believe this could undermine their control of the family. What are successful multi-generational families doing to intentionally create a family culture of interdependence? Attendees will leave this session with an understanding of engaging actionable steps they can take to affect positive change in their families.

- We will examine why wealthy parents often unknowingly encourage an unhealthy level of independence in their children. Often the roots of their motivation to do so comes from their own family background and culture. What parts of that background should we keep and what parts should we discard?
- We will discuss the problem of conflict avoidance and the damage it does to the whole family. How do we practice and manage conflict rather than avoid it? If lack of trust around group decision making is the root cause of conflict avoidance, how do we intentionally build, rebuild, and keep trust?
- We will describe the Six Step Process to Healthy Family Governance. Families that have preserved their family culture and their wealth for multiple generations often use these six steps in each of their family meetings as agenda items to be covered yearly. Attendees will learn what successful families cover in their meetings and why. Most importantly, attendees will come away with actionable, practical, and fun ideas that will can be added to family meetings to create a lasting and multi-generational family legacy.

9/23 MONDAY AFTERNOON

3:30 PM–5:00 PM

Family Office Session I

Family Office 101

Salon 1

Family Office Session II

Protect your Financial Assets & Data

Conference Room D

Family Business Session

Creating Purpose and Vision in the Family Enterprise

Conference Room E

Family Connection Session I

Fostering Interdependent Generative Families for Long-term Sustainability

Conference Room C

Family Connection Session II

Navigating Difficult Conversations toward Conflict Resolution

Conference Room A

Next Gen Session

Fully Engaged—the Next Generation

Salon 5

5:00 PM–9:00 PM

SEFOF Attendee Welcome Dinner

Join us for dinner at the Atlanta History Museum and Cyclorama. This social gathering with your fellow conference attendees is designed to allow you to unwind, continue conversations and begin new ones with our SEFOF community. Year over year, SEFOF attendees report that the reason they continue to attend this conference is the quality of the people they meet, so join us for a wonderful meal, fantastic company and see the newly opened exhibit: Cyclorama: The Big Picture, featuring the fully restored cyclorama painting, The Battle of Atlanta. At the centerpiece of this new multi-media experience is a 132-year-old hand-painted work of art that stands 49 feet tall, is longer than a football field, and weighs 10,000 pounds. This painting is one of only two cycloramas in the United States—the other being the Battle of Gettysburg cyclorama —making Atlanta home to one of America's largest historic treasures.

9:30 PM–10:30 PM

Next Gen Social

Join your next gen peers in a fun, relaxed environment at Escopion. Meet new friends and catch up with old, share stories, interests, and discuss relevant topics at this lively Midtown restaurant, where you can enjoy some Mexican street fare, award winning tequila cocktails, and a great patio overlooking Peachtree street. Sign-up at registration.

MONDAY AFTERNOON SESSIONS

Pre-Conference Workshop
Designing and Professionalizing the Family Office
Presented By: Family Office Exchange: Charles B. Grace III

Single family offices can be defined as legal vehicles used to help oversee, manage, and coordinate – in an integrated and even holistic manner - substantial private wealth on a customized basis. With that in mind, what should be the focus when building out the infrastructure of the office or refining the strategy? The workshop will focus on tactical and strategic elements that can help family members and senior family office staff when establishing an office or taking it to the next level. There will be an examination of why and how a family office can be made effective and best serve the family.

Family Office Session I
Family Office 101
Speakers: Anne Jones, Jennifer Eaton, Spence Maners, William Taylor

While each family office is as unique as the individuals and families that it serves, there are fundamental questions to ask and steps to take in developing one. Our panel of experienced family office executives will discuss their experiences and answer questions about establishing and growing a flexible and lasting family office. Some topics that will be addressed are: Does my family need a family office? If so, what is its scope & purpose? What type of family office will it be? Should it be a virtual family office, single family office or multi-family office? What is the proper structure, governance, and organizational design for our family office? What is the cost of a family office? What role does the family play in the family office? What services should be delivered by the family office? What is the process to decide this? Should they be insourced or outsourced? What are the processes for managing human resources? Family Office 101 is a highly interactive session that promises active discussion between participants and panelists.

Family Office Session II
Protect your Financial Assets & Data
Speaker: Gary J. Sorrentino

Moderator: Hunt Broyhill

Cybercrime and identity theft have become headline news and cost consumers and private industry billions of dollars every year. Gary will discuss cyber trends and best practices system users can implement to protect their financial assets and data. Attendees are encouraged to bring smartphones or other mobile devices to fully engage in this interactive presentation. Panelists will share real experiences their office had with cybersecurity threats to their systems.

Family Business Session
Creating Purpose and Vision in the Family Enterprise
Speakers: Tina Lovejoy, David York

David York, one of SEFOF's most popular keynote speakers, returns to conduct a workshop on purpose and vision as the building blocks for a successful family enterprise. During this workshop you will work collaboratively with other attendees to identify your specific type of enterprise from a purpose standpoint. You'll dive deep into the Why of your enterprise, then discuss your findings with others in small groups. Enterprising families who attend this session will come away with thought-provoking questions, illuminating discussion and detailed materials to help your family continue to strengthen your collective commitment to purpose and vision back at the office.

Family Connection Session I
Fostering Interdependent Generative Families for Long-Term Sustainability
Speaker: Tom Rogerson

Interdependence is a key ingredient in sustaining families—and wealth—over generations. Today's families frequently encourage individual independence to the point of family members becoming separated and estranged. The role of interdependence as an element of sustaining families is illustrated in Dennis Jaffe's study of families that have sustained or expanded their wealth for more than 100 years. Jaffe calls these families "generative families" for some of the common characteristics they demonstrate. They include vitality, creativity, and the ability to continually reinvent themselves over generations. While generative families all have individual performers, they have a shared commitment to working together. The panel, with the audience's participation, will explore: 1) How one family navigated the treacherous waters of selling a family enterprise and then creating a Family Office, all while maintaining family cohesiveness. 2) How an advisor can structure a plan to support the Family's Purpose and then endow a multigenerational process of success.

Family Connection Session II
Navigating Difficult Conversations Toward Conflict Resolution
Speakers: Ron Braund, Roy Jones, Mark Conklin

Learning to navigate difficult conversations is transformational for families and their businesses. Our expert facilitators will lead the audience in how to have difficult conversations by offering practical perspectives to help navigate these conversations toward healthy conflict resolution that builds trust, respect, and cohesion. These are conversations families must be willing to engage in. Many of these difficult or crucial conversations center around business success, estate planning or maybe family unity. These conversations are hard and often challenging, however, they change the trajectory of the family enterprise when done well. You will leave this session with actionable steps and proven process that will help you build and foster a healthy culture in your family or business.

Next Gen Session
Fully Engaged—The Next Generation
Speakers: Kiki Mahar, Camille Crofton Cherry, Katy Schaaf, Dan Bowman

Demonstrating a commitment to engage in the family for a Next Generation member is often viewed in terms of the glass half full or half empty – "I'm interested, but I don't know how to demonstrate that I am". This session will focus on moving along a spectrum of engagement in a range of areas within the family – relationships, education, and ownership involvement. Often times one's position on this spectrum seems random or associated with time of life events. However, members can move along this spectrum of engagement through evaluation of where they are and preparation for the next level as part of a process to successfully demonstrate interest.

9/24 TUESDAY MORNING

6:00 AM–6:45 AM

Morning Run/Walk

Meet in the lobby to join your fellow attendees for a morning run or brisk walk in Midtown to get your body and mind prepared for a great day at SEFOF!

7:00 AM–8:15 AM

Continental Breakfast

7:00 AM–8:10 AM

Table Topics

Sign up during registration on Monday

8:15 AM–8:30 AM

Opening Remarks

Christine Galloway, Program Emcee and Mariann Mihailidis

8:30 AM–9:30 AM

Keynote Address

VITALITY: Re-Thinking What It Means To Live Long and Prosper

Speaker: Dr. Vonda Wright

9:30 AM–10:00 AM

Keynote Reflection

Join your peers for a discussion of the keynote at your table. What big ideas were presented? What takeaways will you share with your family or colleagues?

10:00 AM–10:30 AM

Break

10:30 AM–12:00 PM

Family Office Session

When Does My Family Need a Private Family Trust Company?

Conference Room D

Family Business Session

Managing Paradox and Polarity in Family Business: Finding the Third Way

Conference Room E

Family Connection Session

Multi Generational Family Communications: Practical Tools for Your Family

Conference Room A

Next Gen Session I

Next Generation Risk Taking—Necessary or Taboo?

Salon 5

Next Gen Session II

Doing Good While Doing Well

Conference Room C

TUESDAY MORNING TABLE TOPICS

Please join your fellow SEFOF attendees for important smaller group discussions on subjects of interest to anyone involved in family business and enterprise. Groups will range in size depending on interest and each discussion will be lightly facilitated by individuals experienced in the topic. Come and share what's on your mind, seek answers to your specific questions, offer insight and advice from your own personal experiences….or just listen to what others have to say. This session is meant to offer open, unstructured conversation around the topics that are on your mind.

Successful Family business Succession—How To Do Transition Well

Salon 1

This discussion will focus on important elements of successful family business succession. Topics might include when to begin planning for succession, how and when to involve family in the conversation, training and mentorship, when to step away, where and how to find outside advisors, and how to pass down financial and governance roles and responsibilities.

Generational Succession—Having The Right Conversations

Salon 5

This discussion will focus on the specific conversations that are necessary to assure successful generational transition. Come to discuss and understand what is needed to prepare and develop your next generation of family leaders and governors.

Engagement of the Next Generation—Defining Engagement

Ballroom (Salon 3)

This discussion will explore engaging the next generation and how to help you define, develop and encourage the next generation within your family enterprise. Come see how defining engagement can help both the current generation and the rising generation understand "where they stand", where they want to go, and how to get there.

Family Education—Successful Wealth Education Program

Ballroom (Salon 4)

This discussion will explore building a successful wealth education program for your family and important topics such as education for children and teenagers, parenting children of wealth, education for board development, wealth and responsibility. Come discuss how to assess your family's unique wealth education needs and what are some resources available to help build an effective family education program.

Investments—A General Discussion

Salon 6

This discussion will cover a broad array of topics specific to family investment. We will cover important questions such as the essential considerations in determining the appropriate asset allocation for your family's investment portfolio; some best practices to improve the tax efficiency of your portfolio; and, typical responsibilities of and structures of investment committee.

Healthy Communication—Leveraging Critical Conversations To Support Family Thriving

Conference Room A

This discussion will focus on the importance of healthy communication among family. Often times the most important conversations prove to be the most difficult, especially when emotions run strong, stakes are high, and opinions vary. Come explore why these conversations are so difficult, learn the steps and practice the skills for approaching your conversations differently so that you can be the agent of change to help your family make great decisions together.

Strategic Philanthropy

Conference Room D

This discussion will focus on the ways in which successful families transition from transactional to transformational philanthropy while building deeper family relationships across the generations. Strategic Philanthropy activates and moves families towards a multigenerational legacy that combines the time, talents, values, and resources of that family to create transformational change in the world.

Private Trust Companies—Hot Topics

Conference Room C

This discussion will explore many hot topics surrounding private trust companies. Come and share in conversation around best practices for developing strong trustee and beneficiary relationships, the purpose and role of a discretionary distribution committee, and how much and what types of insurance private trust companies require. Come share what is on your mind regarding private trust companies.

TUESDAY MORNING KEYNOTE

DR. VONDA WRIGHT

Dr. Vonda Wright is an orthopedic surgeon and internationally recognized authority on active aging and mobility. She specializes in sports medicine and currently serves as the inaugural Chief of Sports Medicine and Orthopedics for Northside Health System in Atlanta. An intra-preneur, Dr. Wright was the Inaugural Medical Director of the UPMC Lemieux Sports Complex a 158,000 sqft integrated sports medicine and performance joint venture between UPMC and the 5x Stanley Cup Campion Pittsburg Penguins and the founding director of the Performance and Research Initiative for Masters Athletes (PRIMA). Her pioneering research in mobility and musculoskeletal aging is changing the way we view and treat the aging process.

Dr. Wright cares for athletes and active people of all ages and skill levels from the Division I Georgia State Panthers, Pens Elite developmental hockey teams, University of Pittsburgh Division I athletes, World Rugby 7's and Olympic track and field athletes and the Atlanta Ballet. She is a pioneering physician and thought leader for the new legion of E-Sports athletes.

In addition to her surgical practice, Dr. Wright is a media content expert and regularly appears on national TV shows including "Dr. Oz," and "The Doctors." She is frequently quoted in the Wall Street Journal, New York Times, USA Today and U.S. News & World Report, as well as in magazines such as Maxim, Prevention, Fitness, MORE, Runner's World, Best Life, and Arthritis Today and numerous online publications. She proudly serves on the Sharecare Medical Advisory Board.

Dr. Wright speaks worldwide and has authored five books; "Fitness After 40: How to Stay Strong at Any Age" and "Guide to THRIVE: 4 steps to Body, Brains & Bliss," "Younger in 8 weeks," an "A Parents Playbook for Raising Healthy Athletes," and "Masterful Care of the Aging Athlete." Dr. Wright earned her Masters of Science at Rush University, her medical degree from the University of Chicago, completed a residency in orthopedic surgery at the University of Pittsburgh and her fellowship in sports and shoulder surgery at the Hospital for Special Surgery in New York. She currently lives in Atlanta with her husband, 2x Stanley Cup champion, Peter Taglianetti and their blended family of 6 kids.

VITALITY: Re-Thinking What It Means To Live Long and Prosper

Aging is not an inevitable decline from the vitality of youth the frailty of old age. It is the natural flow of life, and yet, with the passing of each emotionally significant milestone–Childhood, teens, 30-something-we reach middle age wondering…"Will my health last?"

TUESDAY MORNING SESSIONS

Family Office Session
When Does My Family Need a Private Family Trust Company?

Speakers: Kim Kusilek, Louise Maultsby Bristol, Richard Johnson, Steve Smitherman

A private family trust company (PFTC) is a state-chartered entity which serves as a fiduciary for a defined group of family members. In this session we will explore the primary reasons families establish a PFTC and discuss the most common structures. Each family is unique but there many similarities when considering the pros, cons and proper timing for establishing a PFTC to serve as a common fiduciary. Shared family values, long-term family governance and succession planning, liability protection for family members, limiting liability for the persons (who would otherwise determine distributions as a trustee), freedom to select a particular state's trust laws best suited for the family's current and future fiduciary needs and reduction in fiduciary costs are just few of the advantages. Families that already have an established family office are in an excellent position to add a PFTC structure and leverage their trusted advisory team to operate the private family trust company. This reduces personnel cost and creates synergies in investment advisory, tax and estate planning and fiduciary services. Our experienced panel will delve into the reasons the families they serve decided to form a PFTC, the structures they chose, and the lessons learned along the way.

Family Business Session
Managing Paradox and Polarity in Family Business: Finding the Third Way

Speaker: Kelly Lewis

Family business leaders are constantly managing the tension between the rules of business and the rules of family. Often, these tensions take the form of polarities, which might be described as seemingly opposite states that must coexist overtime for success to occur (i.e. profits and purpose, invest and harvest, structure and flexibility, stability and change, organizational interests and family interests). What if we could transcend the either/or thinking that frequently accompanies these inherent tensions and embody both/and thinking in our leadership, families, organizations, and lives? Understanding polarities, the Transformational Third Way, and the vulnerability required to stand in the tension of the "AND" can help us do that. In this interactive session, Kelly Lewis of Lewis Leadership Group, will introduce us to the Polarity Navigator, a sense-making tool designed to help leaders, families, teams, and organizations differentiate and then reintegrate the two interdependent states of a polarity while also making space to explore the vulnerability needed to navigate the contradiction. Participants will walk away with the key family business polarities essential to success and a practical tool to help their families and organizations navigate the polarities essential to family business success.

Family Connection Session
Multi Generational Family Communications: Practical Tools for Your Family

Speakers: Eric Garcia, Jen Garcia

Family dynamics are complex even in the best of times. Understanding that communication has two components is critical, speaking and listening. Individuals have to learn how to listen to understand, not listen to reply and value the gift of listening over speaking. Experiencing being heard is magical, and it creates an open door for new generational connections.

This workshop session will have individual, table, and large group work. The practical applications will benefit the attendees instantly.

Note: A minimum of three key resources will be introduced to aid the attendees in deepening their knowledge in this critical area of life learning.

Next Gen Session I
Next Generation Risk Taking—Necessary or Taboo?

Speakers: DG Elmore, Grant Elmore, Trent Elmore, Hillary Elmore Cage

Moderator: Dr. Gaia Marchisio

By definition entrepreneurs take on greater than normal risks. While this is applauded in the first generation, these same risks can be seen as dangerous and thus discouraged in future generations. This session focuses on leveraging the family and organization to encourage entrepreneurial endeavors. Balancing these seemingly competing goals of risk/reward will be evaluated through the eyes of those learned from their failures which led ultimately to success.

Next Gen Session II
Doing Good While Doing Well

Speakers: Steph Stephenson, Eric Stephenson, Shawn Lesser, Martin Aares

Families are acutely aware of the financial objectives of investing; however, especially among rising generations, impact and leveraging private capital towards societal change is paramount. This session will hear successful examples from families and organizations on how impact investing is done in a manner that engages Next Gen family members, promotes the family legacy and responsibly stewards family assets.

9/24 TUESDAY AFTERNOON

12:00 PM–1:00 PM Networking Lunch

12:00 PM–1:00 PM Faith & Family Session

Family Office's Role in Leadership Development: Developing Next Gen Leadership

Speakers: Lee Paris & Rory Tyer

For people of faith, the most precious gift we can give the next generation is a legacy of faith. Yet it can be difficult to bridge generational and cultural divides to have faith conversations, especially when there are significant differences of core values or faith expressions. In this workshop, you'll have an opportunity to dialogue with others about strategies for passing along a faith legacy. You'll also receive some research-based tools that you can use immediately in your family or business to create openness and readiness for important faith legacy conversations.

Conference Room E

1:00 PM–2:00 PM Keynote Address

Boundless: Passion-Branding for the Family Business

Speaker: McKeel Hagerty

2:00 PM–2:30 PM Keynote Reflection

Join your peers for a discussion of the keynote at your table. What big ideas were presented? What takeaways will you share with your family or colleagues?

2:30 PM–3:00 PM Break

TUESDAY AFTERNOON KEYNOTE

MCKEEL HAGERTY

McKeel Hagerty, CEO of Hagerty, served as International Chairman of the Board for YPO in 2017-18 and has continued on as an ambassador, speaker, moderator and strategic consultant. Most recently, McKeel interviewed Rwandan President Paul Kagame from the stage at YPO Edge in Cape Town about the leadership style that helped him heal a nation devastated by genocide.

During his chairmanship, McKeel traveled the world on YPO's behalf, speaking to leaders and innovators, including Hillary Clinton, Justin Trudeau, London Mayor Sadiq Khan, author and philosopher Yuval Harari and others, about leadership and success.

This summer, ForbesBooks will publish his first book, "Boundless: A Guide to a Flourishing Life in a Disoriented Age." Equal parts inspiration and education, Boundless marries philosophical insights with lessons learned from some of the brightest business minds and greatest leaders. Informed by his love of the classics and his personal experiences, McKeel reveals fundamental truths about what it means to be human while giving readers the advice they need to start living a boundless life.

McKeel grew his family's small insurance agency into an automotive lifestyle brand, international market leader, and one of the nation's largest automotive media companies.

He has become an in-demand media personality and speaker, most recently discussing Boundless at this spring's South by Southwest Festival in Austin, Texas, and hosting a roundtable discussion at the recent TED festival in Vancouver.

Before choosing the family business, McKeel studied to be a Russian Orthodox priest (Saint Vladimir's Orthodox Seminary) and then a philosophy professor (Boston College). He lives with his wife Soon Hagerty near Traverse City, Michigan, the cherry capital of the world, on a narrow peninsula that juts into Lake Michigan. They have three wonderful daughters, Olivia, Sophia and Ava.

9/24 TUESDAY AFTERNOON

3:00 PM–4:30 PM

Family Office Session

Family Office's Role in Leadership Development: Developing Next Gen Leadership

Conference Room D

Family Business Session I

Leveraging Communication Styles to Positively Impact Relationships and Outcomes

Conference Room E

Family Business Session II

Who Does What? Creating an Accountability Grid

Conference Room C

Family Connection Session

What Is In the DNA Of Your Family Enterprise?

Conference Room A

Next Gen Session

The Evolution of a Family Leader

Salon 5

5:00 PM–6:00 PM

Cocktails

Main Ballroom

6:00 PM–9:00 PM

Partner Hosted Dinners

Wish you had a few more minutes to connect with your peers? Would you enjoy tasting some Southern cuisine while chatting among friends new and old? Come join us for the Tuesday night dine-around. Check out the restaurant profiles and menus online and sign up for your favorite and invite a friend. Dinners are presented by our generous sponsors, so the tabs on us. Hope to see you Tuesday night! Sign-up at registration.

TUESDAY AFTERNOON SESSIONS

Family Office Session
Family Office's Role in Leadership Development: Developing Next Gen Leadership

Speakers: Bryn Mars Monahan, David Martin, Shivani Trivedi

The key to continuing the family legacy for generations is a long term education program for family members to develop leaders for the future. Successful continuation of the family legacy over generations must be intentional. This session will include the sharing of experiences from one family member who is a second generation from a newly formed family office and another family member who is fourth generation from an established family office. These family members will discuss the similarities and differences in their experiences and offer insights into leadership development.

Family Business Session I
Leveraging Communication Styles to Positively Impact Relationships and Outcomes

Speaker: James Roberts

In this workshop you will work with tools designed to help move conversations toward positive outcomes. You will assess your own communication style and gain a greater awareness of other styles that may naturally compete with your own. Prior to attending this session, you will be given the opportunity complete your own communication styles assessment (free of charge to attendees – a $50 value).

Family Business Session II
Who Does What? Creating an Accountability Grid

Speakers: Amy Renkert-Thomas, Kiki Mahar

When the founder owns and runs the family business, responsibilities and lines of communication are clear. But as the business grows, non-family management joins the team, shares come to be owned by siblings and cousins – some of whom don't work in the business – and the family branches out, responsibilities may become tangled and lines of communication get disrupted. During this workshop, you will have the opportunity to learn how to develop an Accountability Grid, including: defining roles, identifying key decisions, allocating decision-making power, and making sure interested parties are consulted or notified. You'll meet families who have used this powerful took and see how it can help you. You will leave this interactive workshop with a draft grid and the tools you need to bring your board, senior management team, shareholders and family into the process.

Family Connection Session
What Is In the DNA Of Your Family Enterprise?

Speaker: Mark Conklin

DNA is the genetic code that determines the distinct identity of all living things, including your family enterprise. DNA holds the blueprint or instructions for an organism, or in the case of family enterprises, an organization to be built, developed, sustained and ultimately passed down from one generation to another. In this highly interactive mini-workshop, Mark will use a simple, proven framework utilized when he was Director of Leadership Development at Chick-fil-a and with other family enterprises to guide you through 6 essential steps for developing and passing on the DNA for a lasting organization.

Next Gen Session
The Evolution of a Family Leader

Panelists: Dane Harbaugh, Emily Allenbach

Moderator: Carolyn Greenspon

Effective leadership in a family requires key skills to accomplish a vision while being true to the past generations. This session will focus on how Next Gens have successfully cultivated the necessary skillsets to grow into the role of a family Board Member and leader. Walk away with a new take on paths towards continued involvement within your family organization and a greater understanding of skills and development programs that have served other families well.

9/25 WEDNESDAY

7:15 AM–8:15 AM	Pre-Arranged One-On-One Meetings
7:15 AM–8:15 AM	Continental Breakfast
8:00 AM–8:15 AM	Opening Remarks Christine Galloway, Program Emcee and Wanda Ortwine
8:15 AM–9:15 AM	Keynote Address ***Building a Healthy, Purpose-Driven Global Family business: Insights from Andrew & Dan T. Cathy*** Speakers: Dan Cathy & Andrew Cathy
9:15 AM–9:25 AM	Transition to Peer Group Breakouts
9:25 AM–10:25 AM	Peer Group Breakouts
10:25 AM–10:35 AM	Transition to Closing Keynote
10:35 AM–11:45 AM	Closing Keynote Address ***Culture Eats Strategy For Breakfast: The Ritz Carlton Legacy*** Speaker: Horst Schultze
11:45 AM–12:00 PM	Wrap Up

WEDNESDAY KEYNOTE

DAN T. CATHY

Dan T. Cathy is Chairman and Chief Executive Officer of Chick-fil-A, Inc, one of the nation's largest family owned businesses, and is a member of the company's Board of Directors and Executive Committee. Since taking over the business from his father and founder, S. Truett Cathy, Dan represents the next generation of leadership for the Atlanta-based fast-food chicken restaurant chain. Under his tenure, Chick-fil-A has continued its growth as a market leader in customer service ranking 4th on the 2018 Harris Poll Reputation Quotient (RO®), receiving the 2018 Glassdoor® Employees' Choice Award, and being honored with the Technomic Consumers' Choice Award® for "providing value through service".

Dan's career began at age nine when he sang songs for customers and performed radio commercials for the chain's original Dwarf House restaurant in Hapeville, Ga. Named as Chairman and CEO in 2013, Dan served as the president and chief operating officer since 2001. Previous roles include senior director of operations, vice president of operations and executive vice president.

Dan serves on the board of directors for The Georgia Aquarium, the Metro Atlanta Chamber of Commerce, the Atlanta Committee for Progress, Eagle Ranch, Global Teen Challenge, and Heritage Preparatory School. Additionally, he is a member of the board of councilors for The Carter Center.

A musician known to pull out his trumpet inside and out of the office, Cathy also enjoys the quieter hobby of gardening and landscaping. He's a former high school competitive wrestler and lifelong athlete who's completed multiple marathons. A member of the "Moo Cow Bikers," he hits the open roads on his motorcycle with friends, and he is also known to take to the skies piloting small jets. Most recently Dan has become a road cyclist on his Chick-fil-A branded bike.

Dan and his wife, Rhonda have two sons, Andrew, senior vice president of people at Chick-fil-A, and Ross, Operator of Midland FSR and four grandchildren.

ANDREW CATHY

Andrew Cathy is executive vice president of operations for Chick-fil-A, Inc., and a member of the company's Executive Committee. In his current role, Andrew oversees the selection, cultivation and development of Chick-fil-A's franchised restaurant owners and is responsible for all business operations of Chick-fil-A restaurants nationwide.

Prior to his work at Chick-fil-A, Andrew taught business courses and coached football and track at Landmark Christian High School.

The eldest grandchild of Chick-fil-A founder, S. Truett Cathy, and son of CEO, Dan Cathy, Andrew joined the family business as a franchised restaurant operator. After 18 months of operating his own Chick-fil-A restaurant, he joined Chick-fil-A, Inc. in its West Coast office as a franchisee consultant. Since moving to the Atlanta headquarters, he has held jobs of increasing responsibility, most recently as the senior vice president of people.

After receiving his bachelor's in business education from the University of Georgia, Andrew successfully completed the Stanford University Executive Program and the Harvard Business School Families in Business Program.

In addition to his role at Chick-fil-A, Andrew is the owner of Four Stones Group and serves on the board of directors for Pinewood Atlanta Studios and the Atlanta Community Food Bank. He also serves on the board of trustees for Point University.

He and his wife, Mandy, have four children.

Building a Healthy, Purpose-Driven Global Family Business: Insights From Andrew & Dan T. Cathy

Join a session featuring Dan T. Cathy, Chairman & CEO, and Andrew Cathy, EVP of Operations, of Chick-fil-A, one of the nation's largest family-owned businesses. Dan and Andrew represent the next generations of leadership for the Atlanta-based fast-food chicken restaurant chain founded by Dan's father and Andrew's grandfather, S. Truett Cathy.

In a conversation facilitated by Roy Jones, former Executive Director of the Cathy Family Office and current SEFOF Board member, Dan and Andrew will share insights into how the Chick-fil-A continues to grow while maintaining a commitment to the foundational principles that built the Chick-fil-A business.

WEDNESDAY PEER GROUP BREAKOUTS

Come join in conversation with like-minded SEFOF peers who are likely facing similar challenges, opportunities, dilemmas and circumstances as you are. Each gathering will be lightly facilitated, allowing for a relatively unstructured discussion to allow common ideas and concerns to drive the conversation. Come and share your perspectives, stories, enthusiasm, expertise and concerns while also benefiting from the ideas and experiences of your peers.

Family Office Executives—Multi-Generational Families (G3 and Beyond)
Conference Room A

This group is for family office executives or members who serve families in their third generation of leadership or beyond. This group is open to both single family and multi-family offices.

Family Office Executives—G1/G2 Families
Conference Room D

This group is for family office executives and members who serve the first and second generations of a family (ie: G1 wealth creators and their children). This group is open to both single and multi-family offices.

Family Members—With Family Businesses
Conference Room E

This group is for family members whose family enterprise includes an operating family business.

Family Members—Post Liquidity
Salon 1

This group is for family members whose families have experienced a liquidity event or will be experiencing one soon.

Next Gen
Salon 5

This group is for family members who are currently in line or are actively preparing to take over leadership of a family business or other family-held entity.

Partners
Salon 6

This group is for SEFOF Partners to gather in an open forum to discuss topics of interest and learn about one another. SEFOF Partners' services encompass a range of family and family office situations and needs.

WEDNESDAY CLOSING KEYNOTE

HORST SCHULZE

A legend and leader in the hotel world, Horst Schulze's teachings and vision have reshaped the concepts of service and hospitality across industries.

Mr. Schulze's professional life began more than 65 years ago as a server's assistant in a German resort town. Throughout the years he worked for both Hilton Hotels and Hyatt Hotels Corporation before becoming one of the founding members of The Ritz Carlton Hotel Company in 1983. There Mr. Schulze created the operating and service standards that have become world famous.

During his tenure at The Ritz Carlton, Mr. Schulze served as President and COO responsible for the $2 billion operations worldwide. It was under his leadership that The Ritz Carlton Hotel Company was awarded the prestigious Malcolm Baldrige National Quality Award- twice- making it the first and only hotel company to ever win even one.

In 1991, Mr. Schulze was recognized as "corporate hotelier of the world" by HOTELS Magazine. In 1995, he was awarded the Ishikawa Medal for his personal contributions to the quality movement. In 1999, Johnson & Wales University gave him an honorary Doctor of Business Administration degree in Hospitality Management. Most recently, Mr. Schulze has been honored as a "Leader in Luxury" by Travel Agent Magazine and its sister publicationLuxury Travel Advisor.

After leaving The Ritz Carlton Hotel Company, Mr. Schulze went onto found The Capella Hotel Group. This luxury hotel company managed some of the most elite properties worldwide, and gave Mr. Schulze the opportunity to further define the luxury hotel industry, receiving countless awards and recognitions.

Today, Mr. Schulze serves on various boards and acts as a consultant across industries. He is currently completing his seminal book on creating excellence.

Culture Eats Strategy for Breakfast: The Ritz Carlton Legacy

Horst Schulz says "I truly believe in Peter Drucker's statement: "Culture eats Strategies for Breakfast". Yes, no doubt! But how do you Create a Culture of Excellence?" You don't want to miss this Keynote, as Horst shares his lifetime of building excellence through the Ritz Carlton world class model he imagined and built a lasting legacy.

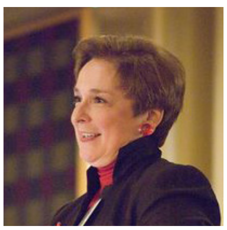
Receive a complimentary copy of Horst's book "*Excellence Wins: A No-Nonsense Guide to Becoming the Best in a World of Compromise*" courtesy of Family Office Matters, at registration.

PRE-CONFERENCE WORKSHOP SPEAKER

CHARLES B. GRACE III

Charlie is Managing Director at Family Office Exchange, focused on consulting, has been active for 20 years in the family office community. In the FOX Advisory Group FOX, he helps clients devise holistic strategies and tactics that support multi-generational wealth, often through a family office. Prior to FOX, Charlie was Chairman of the Management Committee at the single- and multi-family office Ashbridge LLC / Ashbridge Investment Management, LLC. He has been quoted in The Wall Street Journal, New York Times, other publications, and spoken at industry events. He received a J.D. from the Washington College of Law, M.A. from American University, and B.A. from Bates College.

PROGRAM EMCEE



CHRISTINE GALLOWAY

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

FAMILY OFFICE SESSION SPEAKERS

HUNT BROYHILL

Hunt Broyhill serves as Chief Executive of Broyhill Asset Management, LLC, a private wealth management firm.

Mr. Broyhill holds other positions within the Broyhill Family Offices. He is Chairman and President of BMC Fund, Inc., an SEC registered investment company; President of Broyhill Investments, Inc., Broyhill Timber Resources, Inc., Broyhill Family Foundation, Inc., H.B. Development, Inc. and Broyhill Realty, Inc. He is Manager and Vice President of P. B. Realty, LLC.

Additionally, Mr. Broyhill's professional activities include General Partner of CapitalSouth Partners, LLC, and Senior Managing Partner and Director of Flagship Capital Partners, LLC. He also serves as a Director of Capitala Finance Corp.

Hunt is civically active and participates on the Caldwell Community College Foundation Board of Directors (Investment Committee Chair). He previously served on the Executive Board Piedmont Council, Boy Scouts of America, North Carolina Community Colleges Foundation (former Chairman) and Catawba Valley Community Foundation.

Hunt is politically active, and is a former member of the Economic Development Board of the State of North Carolina.

A graduate of Episcopal High School and Wake Forest University, Mr. Broyhill has successfully completed Series 7, Series 24 and Series 63 examinations to earn the designation as a Registered Representative and General Securities Principal with the Securities and Exchange Commission.

His hobbies include aviation, sailing, snow skiing, distance bike riding and scuba diving. Hunt holds private/multi-engine/instrument pilot ratings. Hunt Broyhill is married to the former LeAnne Day and lives in Hickory, North Carolina. He has two adult children, Christian and Paul Hunt, and the world's most wonderful granddaughter, Harbour.

JENNIFER M. EATON

Jennifer M. Eaton is a Partner and Senior Client Advisor at Ballentine Partners. In her work with families, Jennifer draws on her extensive legal knowledge and wealth planning skills to assist families to define, articulate and achieve their various planning goals. She also enjoys working directly with families on non-estate and tax planning matters and spends significant time working with next generation family members.

Prior to joining the firm, Jennifer was a Vice President and Senior Family Wealth Advisor with GenSpring Family Offices for more than nine-years where she worked with wealthy families on a range of subjects including the oversight of tax and estate planning issues, philanthropic endeavors, family governance matters, trusteeship, and coordination of the flow of information with outside professionals.

Jennifer is an active member of the Florida Bar and was an estate and tax planning practitioner and Partner at a boutique law firm in Coral Gables, FL until 2006. In her legal practice, Jennifer worked with high net worth families to identify and solve for her clients' unique and often complex estate planning and asset transfer goals and objectives.

Jennifer earned her Juris Doctor from the University of Miami School of Law and attended the University of South Carolina where she received a B.S. in Criminal Justice. Jennifer is a founding member and the current Vice Chair of Impact the Palm Beaches, a women's giving circle benefiting charities in Palm Beach County. Jennifer is an active member of the Palm Beach and Martin County Estate Planning Councils. Additionally, she is a member of the Elder Law, Real Property, and Probate and Trust Law sections of the Florida Bar.

FAMILY OFFICE SESSION SPEAKERS

RICHARD A. JOHNSON

Richard Johnson is a tax partner with the law firm Waller Lansden Dortch & Davis, LLP. For nearly 30 years, large family-owned and closely held businesses, high net worth individuals, family offices, and tax-exempt organizations have relied on Richard for practical tax, business, and estate and trust planning solutions. Richard formed the first private trust company under Tennessee law and has been responsible for forming or served as local counsel for more than half of Tennessee's private trust companies. He drafted new legislation updating Tennessee's private trust company law, which greatly expanded the definition of a private trust company.

Richard was one of only two attorneys in Tennessee to receive to receive a top ranking (Band 1) in the 2017 edition of the Chambers High Net Worth guide. He is a member of the American College of Trust and Estate Counsel and serves on the Family Office Exchange's Thought Leadership Council. Richard has been recognized since 2001 by Best Lawyers in America for his experience in Tax Law and Trusts & Estates. Best Lawyers named him Nashville's Lawyer of the Year in Tax Law in 2017 and 2015, and in 2012 the publication honored Richard as Nashville Lawyer of the Year in Trusts and Estates. Richard has served as Chairman of the Tax Sections of both the Tennessee Bar Association Tax and the Nashville Bar Association. Additionally, he is a fellow of the Nashville Bar Foundation, and he is recognized as a "Mid-South Super Lawyer."

Richard earned his J.D., with honors, from the University of Tennessee College of Law in 1986 and his LL.M. in Taxation from the University of Florida in 1987. He earned a B.A., cum laude, in Accounting from the University of Mississippi in 1983. Richard is a Fellow in the American College of Trusts and Estates Counsel and the former chairman of the tax section of the Tennessee Bar Association.

ANNE JONES

As Director of Family Financial and Estate Planning for the owners of Simmons Foods & Affiliates, Inc., Anne works closely with family members and their advisors to serve this multi-generational family in its various financial planning activities. Prior to her role with the Simmons family, Anne worked as an accountant in the Sonoma County wine industry. She spent her childhood in Anchorage, Alaska and attended university in northern California. She is an advocate for effective financial education and teaches personal finance to high-school students. Anne has been married to Preston for twenty-five years and they have two children, Eleri (age 17) and Elliott (age 13).
Anne is a CFP® practitioner and has a M.S. in Personal Financial Planning. She is a member of the Family Firm Institute and the Financial Planning Association.

KIM T. KUSILEK

Kim T. Kusilek is COO of HRK Group, Inc., a single-family office, and HRK Trust Company, a private trust company chartered for the Andersen Windows Family. HRK provides integrated financial services to fourth through sixth generation family members. Kim's primary responsibilities are to organize and execute the Financial Services for each family member, which includes tax planning and compliance, financial reporting, investment accounting and reporting, and risk management. In addition, she acts as an advocate and trusted advisor for all her clients in their pursuit of financial prosperity.

Kim worked in the Tax Department at Andersen Windows before joining HRK in 1996. She began her career at KPMG.

Kim has a bachelor's degree in Accounting and is a Certified Public Accountant. Kim is married with two children and in her free time enjoys hiking, kayaking, sport activities, gardening, and reading.

SPENCE MANERS

Spence Maners serves as CFO of Bassaidai, Inc. located at the Carlton Family Offices in Nashville, Tennessee. He has served in this position since January 2010. His prior appointments include the CFO of Fisk University (2005 - 2010) and external auditor for BDO/Crosslin Associates (2002 - 2005), both located in Nashville.

Spence, a certified public accountant earned his bachelor's degree at the University of Mississippi in 2002. He and his wife, Katie, have two daughters, 12 and 9 years of age.

FAMILY OFFICE SESSION 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 in 1977 when the Foster family sold their steel business and decided to continue together as a family. Today, the Foster family is comprised of eighteen households spanning second through fifth generations. David oversees the family's investments, educational programs, generational planning, philanthropy and taxes.

David also provides consulting services to family offices through FAM Legacy Solutions. These services center around providing value to family members. Areas of focus for the consulting services includes the formation of family offices, creating governance structures and educational programs for family members.

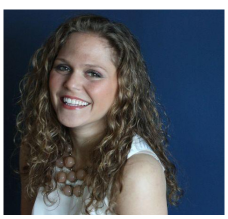
Charitable activities include: Member of the Board of Directors of the Private Investor Coalition, Trustee of the YMCA Retirement Fund, Member of the investment committee and finance committee of the Carnegie Museums of Pittsburgh, Member of the Board of Directors of the YMCA of Greater Pittsburgh, Chair of the investment committee of the United Way of Southwestern Pennsylvania.

LOUISE MAULTSBY BRISTOL, J.D.

Louise serves as Piedmont's Senior Trust Officer with primary responsibilities of client service and business development. As a member of Piedmont's senior leadership team, Louise contributes to the strategic discussions regarding the controlled growth and direction of the firm. In addition, as a licensed North Carolina attorney, Louise acts as a legal resource for company matters and all client teams.

Prior to joining Piedmont, Louise was in the private practice of law in Greensboro specializing in trusts and estates at Adams Kleemeier Hagan Hannah & Fouts (now Nexsen Pruet, LLC) and Schell Bray PLLC. She also served as Director of Advancement at Canterbury School in Greensboro.

Louise earned a B.A. with Honors in Economics and a J.D. from the University of North Carolina at Chapel Hill. She is a North Carolina Certified Specialist in Estate Planning and Probate Law and a Series 65 license holder.



BRYN MARS MONAHAN

Bryn Mars Monahan 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. Bryn is a fourth generation family member, and sits on her family's Board of Directors, as well as the board of their Family Office Consulting Company, Fam Legacy Solutions. She is a thought leader in the family office space, and has been featured as a speaker at countless organizations. She is also on the advisory board for numerous organizations, including Chair-elect for SEFOF 2020. Bryn recognizes the importance of independence as a defining feature of her lifestyle, and uses that value to drive her forward.

STEVE SMITHERMAN

Steve Smitherman has over 17 years of family office experience. He is Vice President of The Family Private Trust, LLC and The Family Office, LLC where he manages client family relationships, private trust company and family office operations. His areas of focus include client/beneficiary relationships, financial reporting, technology, tax, and estate planning.

Steve's prior speaking experience includes panel discussions for Southeastern Family Office Forum and Family Office Exchange on the topics of family office operations, trustee/beneficiary relationships and private trust company operations.

Steve is a Certified Public Accountant and earned BA degrees in Business and Marketing from Belmont University in Nashville, TN. He is a member of the Tennessee Society of CPAs and a founding member of Society of Leaders in Development (SOLID). He also volunteers with several organizations, including CPA Dads and Father's Heart.

FAMILY OFFICE SESSION SPEAKERS

GARY J. SORRENTINO

Gary Sorrentino is a Managing Director for J.P. Morgan Asset & Wealth Management (AWM), and is the Global Head of Client Cyber Awareness and Education.

For over 12 years, Gary was the Chief Technology Officer for AWM's global technology infrastructure initiatives, where he managed its Data Privacy program and was responsible for Infrastructure, Application and End User Technology Production Support. In 2014, he assumed his current role as the lead for AWM's Cybersecurity efforts. He has since developed a firm-wide "Protect the Client" Cyber program designed to raise cybersecurity awareness among employees and clients.

With almost 40 years of experience in Information Technology, Gary has served in various other IT leadership positions in firms across the financial services industry. Prior to joining J.P. Morgan in October 2005, Gary was Head of Global Infrastructure and Head of Technology Efficiencies at Citi Private Bank, where he was responsible for Global Infrastructure Support and strategic technology initiatives. Other roles he has held include Global Technology CFO at Credit Suisse and North America IT Controller at UBS.

WILLIAM TAYLOR

Mr. Taylor serves as President & CEO of The Springs Company, the Family Office for the Close Family of Fort Mill, SC, whose legacy business was the textile giant, Springs Industries. The Springs Company (TSC), founded in 1967, supports 33 adult family members in G3-G5, with another 17 already in G6. Additionally, it oversees an expansive real estate portfolio, a number of wholly-owned operating companies, and a sizable passive investment portfolio. Within the real estate portfolio, the Company remains active in development of multi-family apartments, Class A office, retail and mixed-use properties.

Mr. Taylor has led The Springs Company for 27 years, coming to Springs after a 10-year career at First Union National Bank. In addition to serving on all internal boards, he serves on the boards of several privately held companies: Biltmore Farms LLC, The Beach Company, Central Realty Holdings, and previously Thomas Rutherfoord, Inc. He has served as Board Chair of both Charlotte Regional Partnership and Saint Mary's School (Raleigh), and on the boards of Kanawha Insurance Company and Wachovia Bank of South Carolina. Mr. Taylor is a member of World President's Organization. He is a graduate of Washington & Lee (BS in Commerce) and Wake Forest (MBA).

He resides in Charlotte with his wife, Lee. They have two grown daughters.

SHIVANI TRIVEDI

Shivani Trivedi is Vice President of The Trivedi Family Office and Foundation based in Pittsburgh, PA. As a second generation family member, she serves on the Board of Directors for both the family office and the family foundation.

Prior to joining her family office in 2017, Shivani lived in New York City and worked as a fashion designer. Currently, she is a Fellow at the University of Pittsburgh's Entrepreneurial's Fellow Program. She also serves on the Board of Directors and launched the Pittsburgh chapter of ProjectArt (a non-profit which is America's largest free art school without owning a single building), and avidly pursues her interests in holistic health and wellness.

She holds a Bachelor of Arts in Psychology from Boston University and an Associates Degree in Fashion Design from Parsons the New School for Design.

FAMILY BUSINESS SESSION SPEAKERS

KELLY LEWIS, PCC

Kelly Lewis, PCC, is Principal of Lewis Leadership Group, a leadership development and coaching firm committed to helping organizations and individuals uncover their power and joy. Kelly leverages her in-depth knowledge of Polarities and Paradox coupled with her fifteen years as a Fortune 500 executive to help her clients navigate the complexity, ambiguity, and rapid change inherent in leadership. Kelly's clients by expanding their perspective and increasing their capacity for courageous action. Kelly is honored to serve on Georgetown's Institute for Transformational Leadership faculty and as the Co-Director of the Navigating Polarities Executive Certificate. She is a contributing author to On Becoming a Leadership Coach (2008) and author of *Navigating Polarities: An Introduction to Transforming Complex Tensions*, due out this fall. Kelly lives in Richmond, Virginia, with her husband and two pups.

TINA LOVEJOY

Tina Lovejoy is the Director of Entrusted Planning. Tina draws from her background in writing, teaching, and opera to facilitate sessions with high capacity families and family businesses to unearth their core values through a language-centric lens. She helps clients clarify their culture and purpose, then integrate their themes into their estate planning and business succession planning. Tina also works on the training and licensing side of Entrusted Planning creating training content drawn from her ongoing client work and readying advisors and firms to integrate the Entrusted Planning process into their own business framework. She was recently a panelist at The Family Meridian Advocate Summit as well as The Journey of Successful Wealth Transfer with Purposeful Planning Institute.

KIKI MAHAR

Kiki is a third generation owner of Tauck, Inc, her family's 94 year old travel company, based in Wilton, Connecticut. In that role she has helped develop and oversee the company's Board of Directors, has established multiple family and company policies related to family ownership, including Growth and Investment Policies, a Family Employment Policy, the owner's Shareholder Agreement as well as developing a system for accountability and decision making across multiple stake holders within their family system. In addition, she and her family have built a multi-generational governance structure to effectively support the family's growing enterprise activities.

Kiki serves as President of the Tauck Family Foundation whose mission it is to support the development of social and emotional skills of the children in Bridgeport, Ct so that they can reach their full potential in school and life. She thoroughly enjoys this work as well as volunteering her time with many other organizations in her community.

Kiki is a graduate of St Lawrence University and recently completed the Kellogg School of Management Executive Program: Governing Family Enterprises. She resides in Rochester, NY with her husband, Dan, and their five children.

AMELIA RENKERT-THOMAS

Amelia Renkert-Thomas is the founder of Renkert Thomas Consulting LLC, the author of Engaged Ownership: A Guide for Owners of Family Businesses (Wiley, 2015), and a Professor of the Practice of Family Business at the University of North Carolina Kenan-Flagler Business School.

Renkert Thomas Consulting LLC 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.

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.

Amelia comes from multi-generational businesses on both sides of her family. Amelia succeeded her father and served as President of Ironrock, Inc.—a fifth-generation family-owned and managed producer of ceramic tile and thin brick located in Canton, Ohio—from 1990 to 2002. She remains closely involved with Ironrock as a director and officer. Her maternal grandfather founded Fisher-Price Toys.

Amelia lives in Rougemont, NC. She received her B.A. from Yale College, her J.D. from Harvard Law School, and her LL.M in Taxation from the Case Western Reserve University School of Law. Amelia is a member and former director of Attorneys for Family Held Enterprises (afhe).

FAMILY BUSINESS SESSION SPEAKERS

JAMES ROBERTS

James Roberts, after a successful career in technology sales, began coaching sales leaders to help them realize greater success, both in their personal and professional life. He helped form an organization to assist non-profit leadership teams in the areas of performance and governance and, with his leadership team, developed material that has been utilized by leadership teams worldwide. It was at that time he met the authors of the Style of Influence® ("SOI") assessment and began utilizing it in his consulting engagements. Since 2010, James has been the CEO of iDynamx, LLC, where he has worked with companies, educational institutions and non-profit organizations, guiding them to have best conversations so they achieve maximum results.

DAVID R. YORK, ESQ., CPA

David R. York is an Attorney, Certified Public Accountant and Managing Partner with the Salt Lake City law firm of York Howell & Guymon. David practices law in the areas of estate planning, tax, business planning, and non-profit entities. He is a Fellow with the American College of Trust and Estate Counsel (ACTEC) and is the Dean of Legacy with the Purposeful Planning Institute. David has extensive experience in designing and implementing advanced wealth planning strategies for high net worth clients. David has spoken to hundreds of public groups and professional organizations, including the TedXSaltLakeCity, Q Commons, the Hawaii Tax Institute the Purposeful Planning Institute, Investments and Wealth Institute, Valmark Member Summit, the Southeastern Family Office Forum and the Million Dollar Roundtable.

He is the co-author of two books, Entrusted: Building a Legacy That Lasts and Riveted: 44 Values that Change the World, which after its release was the #1 Business Ethics book on Amazon. He also created the game Experience RivetsTM, which helps individuals, families and businesses identify their unique and shared core values to assist them with holistic wealth transfer, effective estate planning and team building. He has also written for Trusts & Estates Magazine, Estate Planning Magazine and Investments and Wealth Monitor. In 2017, YHG was recognized as an Inc. 5000 Company.

David currently serves on the Board of Directors of Holding Out HELP and Healing Nations. He lives in the Salt Lake City, Utah area with his wife Mindy and their five children, Emma, John, Samuel, Hudson and Avery. He enjoys biking, skiing, softball, writing and photography.

FAMILY CONNECTION SESSION SPEAKERS

MARVIN BLUM

The Blum Firm, P.C., established by Marvin Blum over 38 years ago, has law offices in Fort Worth, Dallas, Austin, and Houston and specializes in the areas of estate planning and probate, asset protection planning, planning for closely-held businesses, tax planning, tax controversy, and charitable planning. The company has grown to be the largest group of estate planning attorneys in the State of Texas.

Mr. Blum is known for creating customized, cutting-edge estate plans, now serving hundreds of high net worth families, several with a net worth exceeding $1 billion. Mr. Blum was chosen as one of the "Nation's Top 100 Attorneys" by New York's Worth magazine, and was also named one of the Top 100 Super Lawyers in Texas by Thomson Reuters. He was selected by his peers for inclusion in The Best Lawyers of America – Trusts & Estates. Mr. Blum twice had the honor of asking questions to Warren Buffett at Berkshire-Hathaway Annual Meetings, attracting international media attention. He is a highly sought-after speaker, has been quoted by The Wall Street Journal and The New York Times for his expertise on the estate tax and income tax and also serves on the Editorial Advisory Committee for Trusts & Estates Magazine.

Mr. Blum is dedicated to his community and currently serves as Secretary/Treasurer and one of three Board members (along with Emmitt and Pat Smith) of the Pat & Emmitt Smith Charities, a public charity devoted to creating opportunities for underserved children. Mr. Blum is in his 39th year as Treasurer of the Fort Worth Symphony and serves as Treasurer of The Multicultural Alliance, formerly The National Conference of Christians and Jews, a service organization fighting bias, bigotry and racism. Mr. Blum serves as Treasurer for the Texas Cultural Trust Board of Directors to help raise public and legislative awareness of the importance of the arts in Texas, and is on the Board of Directors for B Sharp Youth Music Program, Inc., a program that fosters positive development of young musicians through emphasis on academic achievement. Mr. Blum is a member of the national Board of Directors of TIGER 21, and is also a member of The University of Texas School of Law's Alumni Association Executive Committee

Mr. Blum, an attorney and Certified Public Accountant, is Board Certified in Estate Planning & Probate Law and is a Fellow of the American College of Trust and Estate Counsel. He earned his BBA (Highest Honors) in Accounting from The University of Texas in 1975, where he graduated first in his class and was named Ernst & Ernst Outstanding Student in Accounting. Mr. Blum received his law degree (High Honors) from The University of Texas School of Law in 1978, where he graduated second in his class and was named the Prentice-Hall Outstanding Student in Taxation. Mr. Blum and his wife, Laurie, reside in Fort Worth, Texas.

RON BRAUND

Dr. Ron Braund is a family business consultant, behavioral health professional, mission leader and author. He is currently president of Family Business Transitions, facilitating family owned business leaders in generational transfer and succession planning to achieve personal & philanthropic goals. His clients include the owners of Chick-fil-A, family foundations, corporate executives and athletes. He partnered with professional golfer and U.S. Ryder Cup Captain, Paul Azinger, to implement a successful team-building strategy in America's victory over the European Ryder Cup Team at Valhalla.

Within the global mission community, Ron has facilitated strategic planning, team building support, member care counseling and critical incident debriefing. His personal focus has been to support the needs of orphans & neglected children through direct care and transition programs. He is committed to serving collaborative networks which implement strategies for foster care programs and country specific family-based solutions.

Ron has over 30 years experience as a Marriage & Family Therapist. He hosted a daily radio program, Marriage & Family Today, in association with Moody Broadcasting.

He is the author or co-author of four books including Understanding How Others Misunderstand You; The Strong-Willed Child or Dreamer?, and Cracking The Code: The Winning Ryder Cup Strategy, Make It Work For You.

Ron and his wife, Ginger, reside in Marietta, Georgia.

FAMILY CONNECTION SESSION SPEAKERS

MARK CONKLIN

Mark Conklin is the founder of Wise Counsel Inc., and is committed to transforming families, leaders and organizations. In July 2018, Mark retired from his role as Director, Staff Leadership Development at Chick-fil-A Inc. where he focused on the strength and sustainability of the CFA staff leadership pipeline.

As a prolific thought leader for over two-decades, Mark helped Chick-fil-A become one of the world's most admired and respected brands. His career with the company included work in Field Operations, Leadership Development, and Talent as the company grew from $400 million to over $10 billion in sales. In 2002, he assumed responsibility for Chick-fil-A leadership development programs and designed, developed, and delivered a range of leadership programs to create effective servant leaders who could operate successfully in a high growth, global, diverse work environment.

Prior to joining Chick-fil-A, Mark spent eight years working in higher education and also served stateside and overseas on active duty as a non-commissioned officer in the U.S. Army.

Mark is a frequent public speaker and has consulted on a range of leadership topics for families, businesses, and non-profit organizations. Most recently, he is leveraging his years working along-side the Cathy family at Chick-fil-A to help enterprising families intentionally steward their ownership, family, and business roles.

A summa cum laude graduate of Nyack College, Mark holds a Master of Divinity degree with a Marriage and Family Therapy concentration from Alliance Theological Seminary. He is also a graduate of Harvard Business School and is a doctoral candidate in Global Leadership Studies.

Mark has served on the board of trustees for Cross International, Focus on iThemba and his local church elder board. He is a Trustee Emeritus at Strong Rock Christian School and currently serves on the board of the With Open Eyes Foundation. A native of Pennsylvania, he and his wife, Joy, have been married 35 years and have two adult children, JohnMark and Sarah and a son-in-law John. Joy and Mark reside outside of Atlanta, GA.

ERIC & JENNIFER GARCIA

Eric and Jennifer Garcia are the cofounders of the Relational Wealth Advisors™. They have extensive backgrounds in marriage and family education and ministry. Their passion is impacting future generations by transforming marriages and families today! They are nationally known speakers on building healthy marriages and strong families.

Since 2008, they have focused on serving high net worth and ultra-high net worth families in building multigenerational family unity. Training professionals in the Relational Wealth Process™, and Family University™ (educating NEXT GEN heirs), is in motion to create a more scalable impact.

Eric and Jennifer have been married since 1991. They have four adult children, and live in Phoenix, Arizona.

BILL HIGH

Bill High is CEO of The Signatry: A Global Christian Foundation. He works with donors, ministries and financial advisors, with a focus on business owners who are looking to sell and/or transition their business to the next generation. He has been recognized as one of America's Top 25 Philanthropy Speakers. Recent books include Charity Shock: Ten Critical Trends Revolutionizing Fundraising and a book co-authored with David Green, CEO and Founder of Hobby Lobby, called Giving It All Away…And Getting It All Back Again: The Way of Living Generously.

CHRIS HERSCHEND

Chris Herschend is Vice Chairman of Herschend Enterprises, the largest family-owned entertainment company in the US. He has been elected by the shareholders to serve on the majority-independent Herschend board of directors since 1997. Chris and fourth generation cousin Austin Herschend lead Elmwood Management, a private investment & management company serving 20 family households in six states. Chris also serves on the boards of Ungerboeck Software International, E Ritter & Company, and Whitefield Academy in Atlanta. Mostly he likes to get up early and drink coffee.

FAMILY CONNECTION SESSION SPEAKERS

ROY JONES

Roy Jones is currently a principal at Seven Hills Strategies, LLC, an Atlanta-based strategic consulting firm. With Seven Hills, Roy will serve as a coach and advisor drawing upon his experience and business acumen developed over a decades-long career.

Most recently, Roy served Chick-fil-A, Inc. as the Executive Director of the Cathy Family Office. Roy was recruited by Dan Cathy, the Chairman and CEO, in 2014 to build a dynamic team of professionals to serve both the family's multiple households and Chick-fil-A, Inc. Roy led the team that provided a variety of services to the Cathy family, including estate planning and administration, financial planning, income and estate tax, private foundation governance, family governance, real property and investment management, risk management, and other services. He also served as the captain of a "Dream Team" of Chick-fil-A leaders and external consultants that was charged with delivering a comprehensive plan and structure for Chick-fil-A to remain privately owned by the Cathy Family for generations to come.

Roy initially honed his family office management skills leading the Family Office of Henry F. "Hank" McCamish from November 1998 through January 2004. As part of the McCamish team, Roy served as the Chief Investment Officer, Chief Operating Officer and General Counsel of the McCamish Group. He also served as the President of McCamish Foundation. The Foundation focused on entrepreneurial investing, with all gains being given to Christian, educational, and humanitarian causes.

Roy practiced law for 14 years in a firm that he co-founded. His practice specialized in commercial real estate transactions and development, private equity, estate planning, deal structure, and financing 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.

From 2004 to 2014, Roy was a founding Director of three private equity funds. With those funds, he built on the experience he had gained as a founding member of both the Advisory and Investment Committees of Greenspring Associates, a Baltimore based PE fund that now manages more than $8.7 BBL of committed capital.

Throughout his career, Roy has served on the Boards of multiple private companies and non-profit entities. He currently serves on the SEFOF Advisory Committee; FOX Executive Council '04; as a Director and Investment Committee Member of Elmwood Management (the Herschend Family Office); and as a Trustee of the Eagle Ranch Foundation.

Roy is a Phi Beta Kappa graduate of Washington and Lee University. After college, he led a successful start-up in Richmond, Virginia then returned to Atlanta to attend Emory University School of Law. He was on the Law Review, graduated with distinction, and received Order of the Coif honors. 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, more than 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.

WENDY ROGERS

Wendy G. Rogers currently serves as Vice President, National Relationship Management of the Signatry, a Christian foundation that has helped families, advisors and ministries send more than $2 billion to charities across the globe. She works with donors to build their family legacy by connecting them with creative giving solutions.

Rogers is a third-generation family business owner and former corporate leader with 25 years of experience in talent development and organizational leadership, branding and market development, financial and operational stewardship, and nonprofit strategy and governance. She spent much of her career in diverse roles for Fortune 100 and Fortune 500 companies, Dow Chemical, DuPont and Chick-fil-A, Inc.

Within her own family office, Rogers currently serves as Director, Griffin Family Investments, LLC and Director, Griffin Family Foundation, where she works in partnership with strategic advisors and family in stewarding all that has been entrusted to the Rogers family in time, talents, relationships and resources.

To enhance her financial management skills, she recently completed an executive program at Northwestern Kellogg School of Management and also received a certification in Private Wealth Management at the University of Chicago Booth School of Business. She lives in Richmond, Virginia with her husband and three daughters, but her family roots are in Georgia. Wendy received her undergraduate degree in International Business from The University of Georgia.

FAMILY CONNECTION SESSION SPEAKERS

CATHY ROGERSON

Cathy graduated with a BA in Social Work from Ohio Wesleyan University. After 38 years of marriage and raising four children, one with learning disabilities and mental health issues she has transferred her life experience into coaching individuals and families through a company called Rogerson Family Services. She holds certifications in Marriage, Life, Emotionally Focused Therapy, Solutions Focused Therapy from the American Association of Christian Counselors and she is certified in the Prepare/Enrich pre-marriage coaching system.

A year ago she teamed up with her husband Tom, at GenLeg Co., and now also works with UHNW families in the family governance space. Their mission is to come alongside families to intentionally introduce and re-introduce them to each other with tools, activities, and metrics designed to measure and build a healthy culture of interdependence for a generational legacy.

Her passion is to see individuals and families walk in health emotionally, relationally, and spiritually by facilitating, motivating and educating them in the process of deep trust and communication. You can find her on Facebook, Twitter, and LinkedIn at Rogerson Family Services.

THOMAS C. ROGERSON

As a recognized leader and pioneer in family governance throughout the world, Tom uses his "Six Steps to Healthy Family Governance" to assist families with communication, philanthropic vision, legacy planning, succession and education. Tom incorporates these critical issues into a client's comprehensive wealth management plan, not only helping to prepare the money for the family, but to also prepare the family for the money. He brings more than three decades of experience to the wealth management industry where he has provided guidance and education to families, helping them transition significant capital, both financial and human, from one generation to the next. He has run Family Governance/Legacy Meetings for more than 200 families from around the world, over ten of which are "Forbes 400" Families.

Prior to starting his private practice Tom was with Wilmington Trust, bringing his wealth management expertise as both a speaker and motivator to not only families but to Wilmington's client facing teams, helping them integrate Family Governance into the fabric of the client relationship, from introduction to full implementation. He created unique messaging called WISE (Wealth Insights Shared Effectively) to motivate prospects, centers of influence, clients, and internal teams towards his integrated approach in managing family wealth. Previously, Tom was Managing Director of Family Wealth Services for BNY Mellon, National Director of Estate Tax Planning with State Street Global Advisors in Boston, and Director of Financial and Estate Tax Planning with Coopers and Lybrand. He holds a bachelor's in Economics from Ithaca College.

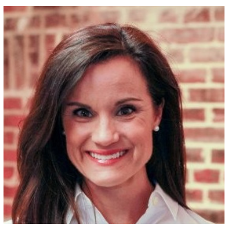
Tom is a much sought after international speaker on the topic of family governance for wealthy individuals, family offices and entrepreneurs. Engagements include: The Young Presidents Organization, The World Presidents Organization, Harvard University Business School, Tiger 21, Babson College, The Lincoln Center, Yale University, Dallas Theological Seminary, Vistage, Penn State Black School of Business, Museum of Modern Art, The Nature Conservancy, New York Botanical Garden, The Dallas Foundation, The New York Community Trust, The Boston Foundation, as well as many other organizations.

NEXT GEN SESSION SPEAKERS

MARTIN AARES

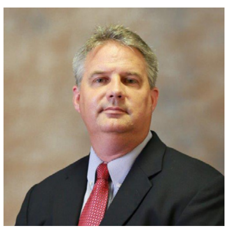
Martin is a veteran sustainability investor with a strong track record in private equity, venture capital and project finance. He has co-founded two investment funds and held leadership positions in several growth companies. He spent nine years at Novus Energy Partners, a clean energy growth equity firm he co-founded in 2007, where he was responsible for investments in solar and energy efficiency sectors, which yielded some of the firm's most successful exits. Martin was also a co-founder and partner of Traverse Venture Partners, a VC firm investing at the intersection of sustainability technologies and the built environment.

Previously, Martin was a senior vice president in GE's renewable energy investment group, GE Energy Financial Services, where he led project finance investments in the solar, wind and biomass sectors. Earlier in his career, he was an investment banker with Goldman Sachs and a vice president with Stern Stewart, a management consulting firm. Martin holds an MBA from Harvard Business School and BS from University of Virginia.



EMILY ALLENBACH

Emily has held active roles on the boards of several of the Tibbetts Family businesses, which involve hospitality, real estate and lumber both in Florida and the Cayman Islands. Emily received an undergraduate degree from The Walsh School of Foreign Service at Georgetown University in 2004, a Master's Degree from Columbia University and a Law Degree from Brooklyn Law School in 2009. After being admitted to practice in Virginia, Emily started her career in immigration law in Washington, DC. Emily and her husband currently reside in Atlanta, Georgia with their three children. She is originally from Clearwater, Florida and holds dual citizenship in the Cayman Islands where her family extends several generations. She enjoys traveling with her family, serving in her church and checking out new restaurants in and around Atlanta.



DAN 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).

CAMILLE CROFTON CHERRY

Camille Crofton Cherry is a third generation family member of Crofton Industries in Portsmouth, VA. She has worked in multiple areas of the business including payroll, project management administration, and marketing. Camille serves on the Board of Governors for the Propeller Club of Norfolk, on the City of Portsmouth's Ports and Industrial Commission, and is the Chair of the Future Leaders Committee for the Virginia Maritime Association. She also serves as Vice Chair of the Advisory Council to the Women's Center at Tidewater Community College. Camille received her Bachelor's from George Mason University and an MBA from the College of William and Mary in 2017. In June of this year, she received a Certificate in Family Business Advising from the Family Firm Institute. Camille lives in Portsmouth, VA with her husband Chad, two dogs and is expecting her first child in November.

NEXT GEN SESSION SPEAKERS

DG ELMORE

D.G. Elmore is a G2 operating as a G1. His father, Dave Elmore, continues to own and build businesses. With a loan from Dave in 1989, D.G. acquired his first company. Since the first acquisition, D.G. has continued to co-found, lead, and acquire multiple businesses in various industries. His industry experience includes travel management, technology, publishing, professional development training, manufacturing, professional sports, and staffing.

The Elmore Companies serves as the family office for D.G. and the next generation of the family who are operating as a G1 by starting and acquiring their own companies. D.G.'s children currently own companies in drone technology, mining, logging, crypto hedge fund, cryptoasset market intelligence and a new made to measure womenswear brand.

D.G.'s degrees include a B.B.A. from the Cox School of Business at Southern Methodist University, an M.B.A. from the Kelly School of Business at Indiana University, and a law degree from the Maurer School of Law at Indiana University.

GRANT ELMORE

Gant is a principal at Elmore Companies where he is involved with deal origination, is an active member of the management team for several portfolio companies, and is involved in the management of Elmore Sports Group, the leading Minor League Baseball ownership group in the country. He is on the executive team of Turner Mining Group, Firmatek, and Bellwether Forest Products. Turner Mining Group is a contract mining company that performs a full spectrum of mining services. Firmatek uses drones and mobile lidar to provide inventory measurement and mapping services for the mining and solid waste industries. Bellwether Forest Products is a full service timber harvester in South Carolina. Gant has a background in finance and law, including both his J.D. and M.B.A, a summer working for Morgan Stanley in New York City, and a summer at private equity firm glendonTodd Capital in Dallas, TX. Prior to pursuing his J.D. and M.B.A. at Indiana University, Gant was drafted by the Milwaukee Brewers minor league system, where he played for a year. Gant received a B.A. in Economics from Yale University in 2011, and received his J.D. and M.B.A. with honors from Indiana University in 2016.

HILLARY ELMORE CAGE

Hillary Elmore Cage is a third-generation member of the Elmore family. She and her husband, Logan, live in Hinsdale, IL, where Logan has recently taken a leadership role in one of the legacy family businesses. Hillary has been involved in several software startups and recently started a new venture in made-to-measure womenswear. She is a graduate of Carleton College (B.A. International Relations, 2006) and Indiana University Bloomington (M.S. Human-Computer Interaction Design, 2009).

TRENT ELMORE

Trent is the cofounder of a cryptocurrency lending startup called Topo Finance, which automates asset management to always earn users the highest interest rate across platforms. After attending Carleton College where he earned a degree in Art History, Trent began work at an Omnicom ad agency in MInneapolis, MN. After 18 months at the agency, Trent elected to go into business with his brother, Brock, who had already built one business in the crypto space. After about 10 months of detours, dead ends, and restarts, Trent and Brock have built a promising product with significant industry buzz heading into launch at the end of Q3 2019. Trent currently lives in Brooklyn, New York, with his girlfriend and two cats, and he enjoys walking, running, and biking around the city when it doesn't smell like hot garbage.

NEXT GEN SESSION SPEAKERS

CAROLYN GREENSPON

Carolyn Dryfoos Greenspon successfully integrates her extensive experience working with families with her passion for teaching and mentoring the next generation to assume their roles and responsibilities as leaders of the family enterprise. Through her efforts collaborating with families, they develop ways of working together that allow for better communication and more effective decision-making. She also partners with them to create family governance structures that work for a growing group of family members that span multiple generations, often with increasingly diverse perspectives.

Prior to Relative Solutions, Carolyn had a psychotherapy practice for 18 years, working with children, adolescents, adults and families. In addition to her work as a therapist, she had a private consulting practice working with multi-generational family businesses whose family members share assets.

Separate from her professional experience, Carolyn has served as both a trustee and board member of her own family enterprise. This gives her a unique perspective on helping families navigate the complexity of sharing financial and business assets. Her belief that "if you take care of the family, you take care of the business" is at the foundation of her work in the areas of ownership systems, transitions and family governance.

Carolyn received her undergraduate degree from Duke University, and her master's in social work from Simmons College in Boston. Additionally, she earned post-graduate certification in Substance Abuse Treatment and Child Psychotherapy. She is a member of the Family Firm Institute.

DANE HARBAUGH

Dane, a Denver-born Colorado native, is a highly engaged fourth generation family member of a large, enterprising family, who is excited by the opportunities and challenges of generational transition in family organizations. He is passionate about developing lasting family bonds while prioritizing responsible stewardship of family assets and cultivating multi-generational leadership. He wears many hats in his family organization including family council board member, foundation trustee and investment committee member, former education committee chair and private trust company board member. Dane previously worked in real estate finance and multi-family development. He cares deeply about his community and is focused largely on natural resource conservation and youth outdoor education. He received his MBA and MS in Real Estate and Construction Management from the University of Denver and BS in Finance and Management from Tulane University in New Orleans.

SHAWN LESSER

Shawn brings over twenty years of experience in the financial advisory sector to Big Path Capital. Prior to co-founding Big Path Capital, Shawn founded the investment bank, Sustainable World Capital, which assisted cleantech companies in raising capital from European institutional investors. Shawn has been Co-Head and Managing Director of the international equity teams at Morgan Keegan and at Deutsche Bank.

In partnership with Michael Whelchel, Shawn has founded a number of first-of-their-kind initiatives, all of which demonstrate SmarterMoney+ TM Maximize Impact, Maximize Return. Those include the Five Fund Forum, Impact Capitalism Summit, and Impact & Sustainable Trade Missions. In 2010, Shawn also co-founded the Global Cleantech Cluster Association as a meta-cluster to create momentum and move the cleantech market by networking global clusters together.

Shawn speaks at events around the world on the topic of Impact and Sustainable Investment and partners with the US Department of Commerce in conducting Impact and Sustainable Trade Mission. Shawn received his BS in Finance from Syracuse University and is conversant in German, Spanish, and Chinese.

NEXT GEN SESSION SPEAKERS

KIKI MAHAR

Kiki is a third generation owner of Tauck, Inc, her family's 94 year old travel company, based in Wilton, Connecticut. In that role she has helped develop and oversee the company's Board of Directors, has established multiple family and company policies related to family ownership, including Growth and Investment Policies, a Family Employment Policy, the owner's Shareholder Agreement as well as developing a system for accountability and decision making across multiple stake holders within their family system. In addition, she and her family have built a multi-generational governance structure to effectively support the family's growing enterprise activities.

Kiki serves as President of the Tauck Family Foundation whose mission it is to support the development of social and emotional skills of the children in Bridgeport, Ct so that they can reach their full potential in school and life. She thoroughly enjoys this work as well as volunteering her time with many other organizations in her community.

Kiki is a graduate of St Lawrence University and recently completed the Kellogg School of Management Executive Program: Governing Family Enterprises. She resides in Rochester, NY with her husband, Dan, and their five children.

GAIA MARCHISIO

As an academic and advisor, Gaia studies educates and assists entrepreneurial families and their advisors. Her background in family enterprise started with her family's business where she was raised as a 4th generation successor; to then develop through her studies and over twenty years of experience in working globally with enterprising families.

As Executive Director of the Cox Family Enterprise Center, she continually drives innovation in content and delivery methods by developing degree and non-degree programs for entrepreneurial families and professional advisors. Marchisio also founded the CFEC's Family Business ClinicTM, the interdisciplinary advisory team that provides families with immediate assistance on the relationship and business struggles.

A native Italian, US Citizen, consultant, and speaker in North and Latin America, Caribbean, Asia, Europe, Noth Africa, Australia, and New Zealand, and fluent in 3 languages, Marchisio has a strong understanding of interacting with and respecting different cultures

KATY SCHAAF

Katy Wilder Schaaf, PhD is a Licensed Clinical Psychologist and a 5th generation shareholder of E. Ritter & Company (ERC). ERC was founded in Arkansas in 1889; it is the parent company to two disparate businesses, Ritter Communications and Ritter Agribusiness.

Katy works in Richmond, VA as a psychologist in private practice and has been the Director of Development and Engagement, for the past five years, with ERC's Family Council. With ERC she also participates as a Board Observer, serves on the Owner's Committee, Next Generation Committee, and previously on the Philanthropy Committee. Together with her family, Katy has worked on difficult family business issues that include promoting family leadership, developing family governance structures, engaging and educating family shareholders who do not work in the business, and developing an ownership mindset. She works with the family council to plan and facilitate quarterly meetings, maintain documents (e.g. strategic plan, family policies, and budget), complete self-evaluations, and plan family shareholder meetings.

Katy's work with her family has led her to publish articles with Family Business Magazine, speak locally and nationally about her work in family business, and serve on the Family Business Magazine Advisory Board. Additionally, Katy is the Director of the Virginia Commonwealth University Family Business Forum, a local forum that seeks to help family businesses in the Greater Richmond community grow and thrive. Because of her work in her own family business, Katy has deep empathy for the conflict, passion, and communication breakdown that can occur in complex, multigenerational, and multi-branch families. She enjoys the rewards and challenges that come with being in business with your family and connecting with others interested in strengthening enterprising families.

Katy holds a B.A. in Psychology and Sociology from the University of North Carolina- Chapel Hill, a M.S. in Marriage and Family Therapy from the University of Maryland, and a Ph.D. in Psychology from Virginia Commonwealth University.

NEXT GEN SESSION SPEAKERS

ERIC STEPHENSON

Eric Stephenson is Director of Client Services at Align Impact and member of its investment committee, advancing the firm's work helping investors and their advisors form and execute effective impact investing and philanthropic strategies. He was previously part of the fund investments team at Hamilton Lane and started his finance career with the global leasing group at Xerox. Eric serves as co-chair of the Cordes Foundation, member of the advisory board for Duke University's CASE i3 Initiative on Impact Investing, is a due diligence mentor at Harvard University's Initiative for Responsible Investment, and is a frequent speaker at universities and industry conferences on the topics of impact investing and social enterprise. Eric earned his BBA from Temple University, MA from University of the Pacific and is an active CAIA charterholder.

STEPH STEPHENSON

Steph Stephenson is Co-Chair of the Cordes Foundation, working to advance the Foundation's ethical fashion and sustainable supply chain initiatives. Prior to joining the Foundation, Steph held positions at Conde Nast and luxury fashion brands Alberta Ferretti and Maiyet. She serves on the Board of Directors for Indego Africa, an innovative social enterprise that lifts artisans and their families out of poverty, and the Advisory Board for Soko, a Kenyan-based ethical fashion brand. Steph is an active member of the Milken Institute Young Leaders Circle and the Nexus Impact Investing Steering Committee and Ethical Fashion Lab.

FAITH & FAMILY SESSION SPEAKERS

LEE PARIS

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.

RORY TYER

Rory Tyer is Co-Founder and Chief Business Development Officer for GoInnovation. His passion is to empower people with the clarity and focus needed to make better decisions. He has facilitated or coached leaders from globally recognized organizations such as Toyota, World Vision International, Amazon, Catholic Relief Services, Coca-Cola, and the Center for Creative Leadership. GoInnovation's mission is to help individuals, teams, and organizations become the best versions of themselves through research-based leadership practices. He lives in Tupelo, Mississippi, with his wife Heather, their daughter Lucy Joy, and their two dogs.

PREMIUM PARTNERS

AIG

Atlantic Capital

BT BENNETT THRASHER LLP

Datafaction
Specialized Accounting Solutions

Family Office Exchange 30 YEARS

FRC

PENDLETON SQUARE®
TRUST & FAMILY OFFICE

John Hancock®

RonaldBlueTrust™
Wisdom for Wealth. *For Life.*®

THE STRATEGIC GROUP OF COMPANIES

USI®

WELLSPRING ASSOCIATES

WHEELS UP™

EDUCATIONAL PARTNERS

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

Relative Solutions™
Inspiring—*and inspired by*—those we serve

HOSTS

ATLANTA JEWISH FOUNDATION
A service of Jewish Federation of Greater Atlanta

Community Foundation for Greater Atlanta

KENNESAW STATE UNIVERSITY

Southeastern Council of Foundations
where grantmakers connect

NOTES

NOTES

NOTES

NOTES