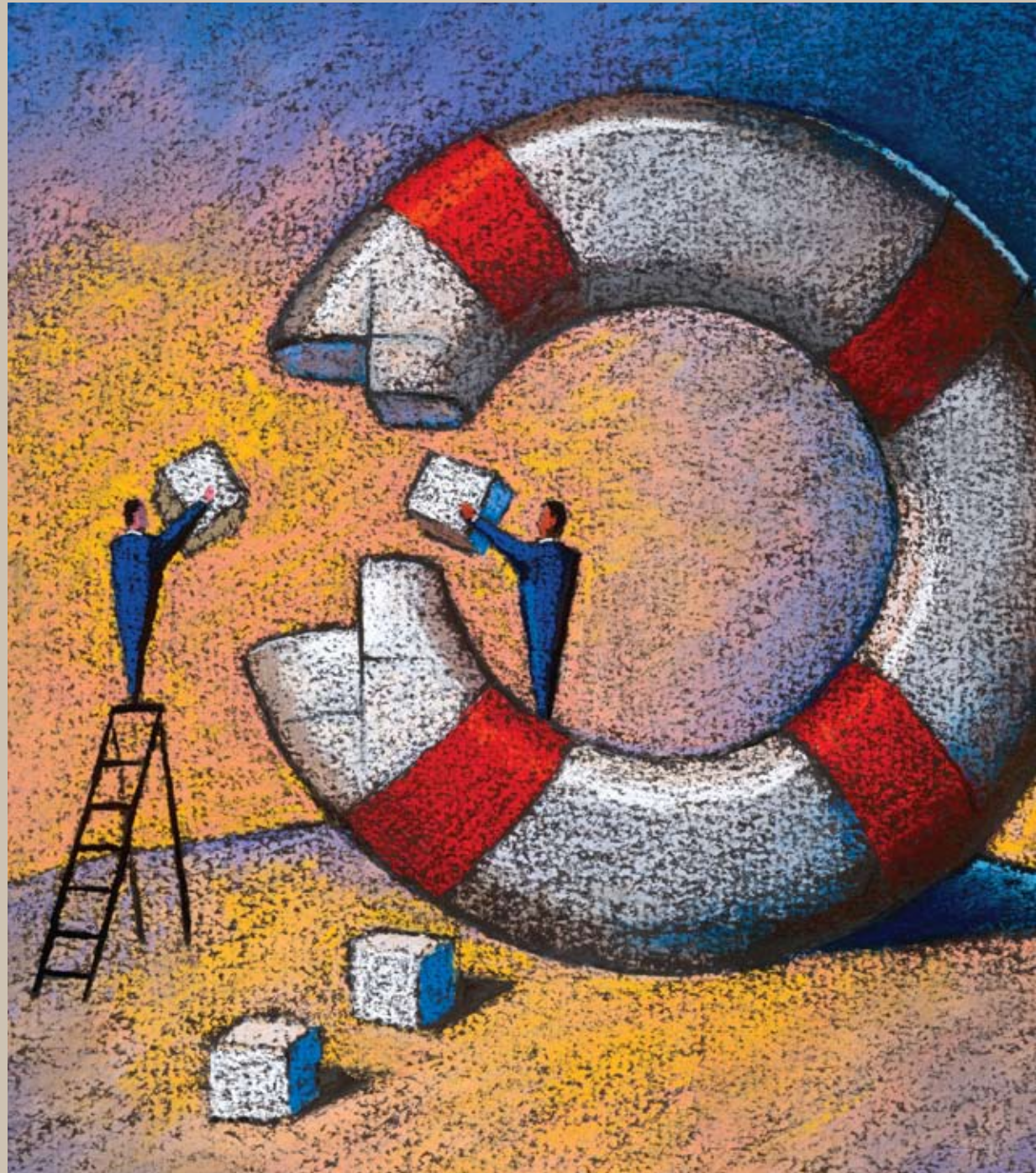


Managing
Risk in
Uncertain Times

JULY 14-15, 2009

TRUMP INTERNATIONAL
HOTEL & TOWERS
CHICAGO, ILLINOIS



AGENDA

SHARED WISDOM



There is no doubt that the current economy has had a profound effect on our members and their strategies to sustain wealth. Family office executives are looking for new solutions to the most pressing issues confronting single- and multi-family offices in the challenging economic climate.

The **2009 Financial Executives Forum** will provide insights and information-sharing among peers on some of the most relevant topics available for today's financial family office executive.

You will hear from experts on:

- Understanding new tax laws and what it means for your clients
- Estate planning for the next generation
- Re-thinking your reward/risk options
- Updating technology to help improve office efficiency

The Family Office Exchange (FOX) invites you to participate in the **2009 Financial Executives Forum** to meet some of the industry's most experienced family office executives and learn how they handled some of the very same challenges you face.

Register today!

FORUM EXHIBITORS

Family Office Exchange (FOX) appreciates the continued support from our exhibitors. To learn more about these exhibitors, contact FOX or visit the FOX website at www.foxexchange.com.

- **Archway Technology Partners**
- **Document Locator by ColumbiaSoft**
- **Fidelity**
- **Investment Systems Company, Inc.**
- **IT4Wealth™ – Investment Tools for Wealth Management**
- **The Burgiss Group – Private / Software**

TUESDAY, JULY 14

4:00 p.m. Speed Networking

Join other FOX members to expand your professional networking through a variety of activities to meet others, exchange business cards and build valuable business relationships.

5:00 p.m. to 7:00 p.m. Welcome Reception and Exhibitor Open Forum

Take advantage of this opportunity to network with your peers and meet with exhibitors in a relaxed, informal atmosphere.

WEDNESDAY, JULY 15

7:00 a.m. Registration/Continental Breakfast

8:00 a.m. Welcome/Industry Perspectives

Sara Hamilton, Family Office Exchange

8:20 a.m. Latest Developments In Tax Law

Todd Angkatavanich & David Stein,
Withers Bergman LLP

This presentation will focus on the latest developments in the tax law, including legislative proposals in Congress, and the implications for families of wealth and the single-family and multi-family offices that serve them. The session will also discuss a number of tax planning strategies that may be useful in the current legal and financial environment.

9:15 a.m. Networking Break

9:30 a.m.

Estate Planning for the Next Generation of Clients

Jeff Pennell, Richard H. Clark Professor of Law at Emory University School of Law

Next generation client demographics are different from their predecessors and estate planning must reflect new attitudes about wealth, the role of women, family, education, work, retirement and inheritance. The challenge is to adapt planning for the next generation to best accommodate these important changes.

11:00 a.m. Financial Executive Dialogue

One of the most valuable benefits of the Forum is the opportunity to meet financial executive peers. In this session, FOX experts lead a discussion of issues surrounding the greatest concerns to family offices.

12:00 Noon Lunch

1:00 p.m. Re-thinking the Risk/Reward Equation

David Lincoln, Family Office Exchange

In reaction to the volatility in the current financial markets and economic recession, FOX is exploring ways in which ultra-wealthy individuals and their advisors are adjusting their financial strategies and re-evaluating known and emerging risks. This presentation examines how investor thinking has changed and what it means for the advisor-client relationship.

2:00 p.m. Networking Break

2:30 p.m. Concurrent Risk Breakout Sessions

During these times of economic uncertainty, people are re-evaluating possible risks that could have a long-term impact on their financial strategies. In response, Hub Personal Insurance is pleased to provide three risk-intensive sessions that offer insight into the importance of domestic staffing, family security and professional liability coverage.

Please select one of the following three sessions:

Domestic Staffing: Hiring, Managing, Terminating

Avoid the pitfalls presented by employing domestic staff with practical advice from Teresa Leigh, founder of Teresa Leigh Household and Property Management.

Personal Security in the 21st Century: Are you doing everything you can to be safe?

Join Dr. Paul Viollis, CEO, Risk Control Strategies, for a discussion of new and old threats to our personal safety. From terrorism to cyber security, Dr. Viollis weaves actual experiences into best practices for keeping you and your family secure.

Professional Liability: When and how much is needed?

Have we felt the impact of the economic crisis on the professional liability market? Hear from Jim Kane, President, HUB Personal Insurance, on trends, errors and omissions in professional liability coverage for directors, officers and trustees.

3:45 p.m.

Technology Update - New Product Solutions and Approaches

Doug Smith, Family Office Exchange
Elaine Spang, Family Office Metrics, LLC

Find out what new products are available to family office executives to better respond to the needs of increasingly complex offices. Discover ways to more effectively utilize existing technology to improve business processes needed to fulfill the functions of a family office.

4:45 p.m. Closing Remarks

5:00 p.m. Adjourn

FORUM LOCATION

Trump International Hotel & Towers Chicago
401 N. Wabash Ave.
Chicago, IL 60601
Phone: 312.588.8000
<http://www.trumpchicagohotel.com/>

FOX has reserved rooms at the Trump International Hotel and Towers at a rate of \$325 per night. To obtain the special rate, contact the hotel directly (877.458.7867) and mention Family Office Exchange. Please note that Forum attendees are responsible for making their own hotel reservations.

Registration

Space is limited; each attendee must submit a registration form to ensure a seat.

Three ways to register:

- 1 Fax this form with credit card information to Marjorie Emerman, 312.327.1212
- 2 Mail this form to: Family Office Exchange
Attn: Marjorie Emerman,
100 S. Wacker Drive, Ste. 900, Chicago, IL 60606
- 3 Register online at www.foxexchange.com

Refund Policy

All Cancellations must be made in writing to Family Office Exchange. A fee of \$500 will be applied to all cancellations received on or before June 15th. After June 15th, a fee of \$1,000 will be assessed. No refunds will be made on-site or for no-shows.

Reception

- I will attend the Speed Networking
- I will attend the Networking Reception and Exhibitor Open Forum

Breakout Session

Please select one of the following breakout sessions you plan to attend: (Please choose one)

- Domestic Staffing
- Personal Security in the 21st Century
- Professional Liability

Name (First/Last)

Name as you would like it to appear on your badge

Family/Firm Name

Title/Position

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

Fax

E-mail

Special Dietary/Accessibility Needs

Member Registration Fee (please check one)

- Registration fee included in membership.** First time attendee
- Registration fee of \$1,800. (Early bird discount must be received by May 14)**
- Registration fee of \$2,100 (After May 14)**
 - Payment by check is enclosed (*Check payable in U.S. dollars to Family Office Exchange*)
 - Please charge the following credit card: VISA MasterCard American Express

Cardholder Name

Card Number

Expiration Date

3 Digit Code (back of card)

Billing Address for Credit Card

City

State/Province

Zip/Postal Code

Country

Cardholder's Signature



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