



*The*  
Family Wealth  
*Alliance*  
We Place Families First<sup>SM</sup>

# SPRING EVENT *2011*

May 18-20

**Oak Brook Hills Resort  
Oak Brook, Illinois**

**By Invitation Only**



**Last Year's Event Sold-Out  
Alliance Member Firms  
Receive Priority Registration**



**Early Bird For  
Registration & Hotel  
Expires April 27<sup>th</sup>**

**Online Registration Is Available**

[www.FWAlliance.com](http://www.FWAlliance.com)

Questions? Call 630-260-1010

*The*  
**F a m i l y   W e a l t h**  
*Alliance*  
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March 31, 2011

Dear Colleague,

We are inviting you to our 2011 Spring Event being held May 18-20 at the Oak Brook Hills Resort. In an exciting departure from previous years, our Spring Event will feature dual themes:

- The findings of our inaugural **External Chief Investment Office Study**: Scalable services offered on an outsourced basis is one of the most important trends in family wealth. Gain insights from this first-ever research in this sector of the industry.
- The launching of the **Alliance Security Council**: Learn about our newest initiative whose mission is to safeguard the lives and livelihoods of private families. Hear directly from experts about key non-financial threats facing families today.

**Recent global disasters** raise issues ranging from preparedness to the best charities suited to assist. Don't miss our **Macro Threats Panel**, which will delve deeper into these areas, as well as longer-term terrorism and climate change trends. Learn what is lurking in the key threat areas directly affecting your client families by listening and interacting during our **two panels on Micro Threats**. Experts will field and discuss critical risks ranging from staffing, security, reputation management, collections, medical, and sustainability.

We are also excited to offer a **Special Panel: Working with the Media**. Editors from Barron's, Private Asset Management, and WGN-TV will advise how to work strategically with them, in order to gain the most for your organization.

After unveiling the results of the new **External CIO Study**, we will discuss trends and implications for the firms in this business, as well as for their clients. Later you'll hear two executives from leading CIO firms express their views on where they see this sector of the industry is headed.

But that's not all! You will also have the opportunity to participate in the activities that are the hallmark of each Alliance event - candid thought-sharing, exciting peer group discussions, provocative white paper presentations, splendid dine-a-rounds and invaluable networking break-outs.

See the agenda for more details. You can register on our website: [www.FWAlliance.com](http://www.FWAlliance.com). **Please note that last year, this event sold out and no hotel rooms were left!** Be sure to avail of our early bird rates for registration and hotel, as both are valid through April 27. We hope to see you and your colleagues here this Spring!

With best regards,

**The Alliance Team**

# AGENDA

## Wednesday, May 18<sup>th</sup>

- |                |                                 |
|----------------|---------------------------------|
| 1:30 – 2:00 pm | Registration                    |
| 2:00 – 4:30 pm | Alliance Advisory Group Meeting |
| 4:30 – 6:00 pm | Informal Networking             |
| 6:00 – 7:30 pm | Alliance Reception              |
| 7:30 pm        | Premier Partner Dine-A-Rounds   |

## Thursday, May 19<sup>th</sup>

- |                  |  |
|------------------|--|
| 7:30 – 8:30 am   | Networking Breakfast   |
| 8:30 – 8:45 am   | Welcome and Introduction<br><b>Tom Livergood, The Alliance</b>   |
| 8:45 – 9:45 am   | Results of the Inaugural External CIO Study<br><b>Bob Casey, The Alliance</b>  |
| 9:45- 10:15 am   | Launch of Alliance Security Council<br><b>Rick Higgins, Alliance Security Council</b>  |
| 10:15 – 10:30 am | Break  |
| 10:30 – 11:00 am | Premier Partner Presentation   |
| 11:00 – 11:30 am | Comparative Elements of MFO, SFO & Ext. CIO Research:<br>Impetus and Implications<br><b>Tom Livergood, The Alliance</b>  |
| 11:30 – 12:30 pm | Assigned Peer Breakout Groups  |
| 12:30 – 2:00 pm  | Networking Lunch   |
| 2:00 – 2:30 pm   | Premier Partner Presentation   |
| 2:30 – 3:30 pm   | Security Council Expert Panel: Macro Threats<br><b>Shoshana Bucholz-Miller, Arabella Philanthropic Advisors</b><br><b>Jim Ludes, American Security Project</b> |
| 3:30 – 3:45 pm   | Special Film Presentation  |

(Agenda Continues on Back Page)

# AGENDA

## Thursday, May 19<sup>th</sup>

- |                |   |
|----------------|---|
| 3:45 – 4:15 pm | Networking Break  |
| 4:15 – 5:15 pm | Breakout Session: Select Your Table Topic   |
| 5:30 – 6:45 pm | Alliance Reception  |
| 6:45 – 7:45 pm | Special Panel Discussion: Working with the Media<br><b>Robert Jordan, WGN-TV</b><br><b>Kristen Oliveri, Private Asset Management</b><br><b>Phil Roosevelt, Barron's</b> |
| 8:00 pm        | Alliance Dinner   |

## Friday, May 20<sup>th</sup>

- |                  |   |
|------------------|---|
| 7:30 – 8:30 am   | Networking Breakfast  |
| 8:30 – 9:15 am   | External CIO Expert Panel Discussion<br><b>Executive from CTC Consulting</b><br><b>Deidre Nectow, Cambridge Associates</b>  |
| 9:15 – 9:45 am   | Premier Partner Presentation  |
| 9:45 – 10:00 am  | Break   |
| 10:00 – 11:00 am | Security Council Expert Panel: Micro Threats I<br><b>Michelle Jordan, Jordan LLC</b><br><b>Teresa Leigh, Teresa Leigh Household Risk Mgt.</b><br><b>Paul Viollis, Risk Control Strategies</b>         |
| 11:00 – 11:30 am | Premier Partner Presentation  |
| 11:30 – 12:30 pm | Security Council Expert Panel: Micro Threats II<br><b>April Hann, The Chicago Conservancy Center</b><br><b>Bruce Spector, Pinnacle Care</b><br><b>Executive from Family Business Consulting Group</b> |
| 12:30 – 1:45 pm  | Networking Lunch  |
| 1:45 – 2:45 pm   | Security Session – Breakout Groups  |
| 3:00 pm          | Closing Remarks   |