

THE NORTH AMERICAN FAMILY OFFICE CONFERENCE

Wealth Transfer & Generational Education

Turn the odds in your family's favor

November 28 & 29, 2017

The Langham • Boston, MA, USA



The 12th annual forum for business-owning and financial families,
significant private investors and their family offices



Main Partners:

SYNTAX LLC

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Organized by:

This event is CPE certified:

Campden Wealth

INSTITUTE
for
PRIVATE
INVESTORS



Wealth Transfer & Generational Education

Over the next two decades, UHNW families will hand over \$2.1 trillion to their heirs. This represents a significant challenge and opportunity for families, since wealth transfer is not just the transfer of assets from the current generation to the next; it is a much more involved process that includes education, values and leadership — and families know it. In 2016, succession planning topped family offices' list of priorities, and this year, under half of family offices globally have a succession plan in place. With this in mind, **Campden Wealth's 2017 North American Family Office Conference** focuses on wealth transfer and the tools and strategies needed to build a multi-generational legacy.

The 12th annual North American Family Office Conference will guide families through the different aspects of wealth transfer — from transforming an investment portfolio and structuring a family unit that is based on multi-family leadership, to educating and interacting with the next generation. You will hear from leading next generation leaders including Ken Natori and Robert Pasin.

As always, this conference will provide leading US and global multi-generational family offices the opportunity to network, benchmark best practices, and learn from thought-leaders in a private and congenial setting.

Each year, Campden Wealth brings together more than 100 heads of families from around the world. Through a series of family-led interactive panel discussions, small group roundtables, and intimate, closed-door sessions, this prestigious conference is designed to be thought-provoking and to provide actionable insights to help families determine their future agendas.

THE CAMPDEN WEALTH DIFFERENCE:

With a ratio of family to non-family participants higher than at any other family investment meeting, the resultant peer networking opportunities are widely acknowledged as being exceptional. Bringing together prominent family speakers, in-depth research and a wealth of industry experience, Campden Wealth has produced an unrivalled range of global conferences over the last two decades, packed with intuitive, informative and timely content.

The event will convene speakers representing leading family office principals, academics, family members, managers and advisors to share their knowledge and experience.

5 REASONS WHY YOU SHOULD ATTEND

- 1 **HEAR** from the best — ultra-high net worth families and individuals will be sharing what they know and how they've dealt with the challenges that come their way.
- 2 **ENGAGE** in interactive group work that will help map out future goals and direction for your own offices and families.
- 3 **LEARN** from industry experts and passionate speakers who are doing incredible work globally.
- 4 Be **EXPOSED** to new investment opportunities in both the closed-door sessions and panel discussions.
- 5 **CONNECT** with leading families and key family office executives from all around the world — develop an impressive network in just one conference.

4 WAYS TO REGISTER:

1. Call Steven Sklar at: **(212) 204-2586**
2. Email Steven Sklar at: **stevensklar@campdenwealth.com**
3. Visit **www.campdenconferences.com/boston**
4. Fax back the enclosed registration form to **(212) 693-2797**

INSTITUTE FOR PRIVATE INVESTORS (IPI) MEMBERSHIP

The Institute for Private Investors is the premier membership for ultra-affluent families, offering conflict-free wealth management education for sustaining and creating wealth — including portfolio management, investment strategies, family offices, advisor relationships, the next generation, governance and philanthropy — all within a safe harbor environment.

For over 25 years, the IPI community of 1,200 private investors has offered unrivalled regional, national and global networking and support to its members through peer-to-peer introductions, online investor conversations and proactive outreach from the IPI team. Membership includes the Campden Wealth events and research in addition to all of the IPI educational programs.

To apply or for more information, contact **Adam Wachter** at **aw@memberlink.net**, call 212-204-2584 or visit **instituteforprivateinvestors.com**

CONFERENCE CHAIRMEN:

PATRICIA SAPUTO • *Chief Financial Officer, Placements Italcen Inc., Canada*

Patricia is the daughter of Francesco and Lia Saputo and has been managing her immediate family's family office in her role as the chief financial officer of Placements Italcen Inc., a diversified investment holding company. Saputo Inc. produces, markets, and distributes a wide array of dairy products of the utmost quality and is one of the top ten dairy processors in the world.

IRMA WANG • *Managing Director, Romar Capital, IL, USA*

Irma Wang serves as the managing director of Romar Capital, a Chicago-based family office established since 1996. Irma started her career in a boutique mergers and acquisitions firm with a focus on venture-backed biotech startups. In 2008, she joined Credit Suisse Private Bank in Singapore where she advised on portfolio allocation strategies for high net worth clients. Irma graduated from the Northwestern University with a major in chemical engineering and later obtained her MBA from the University of Chicago Booth School of Business.

FAMILY MEMBERS AND FAMILY OFFICE SPEAKERS:

IAN SMITH • *Third-Generation Family Member and Vice President, Hillcrest Holdings, IA, USA*

Ian joined the family trucking business, CRST International, after getting an MBA from Cornell University's Johnson School of Business. He worked on the company's M&A efforts as well as sitting on the board of directors. Currently, he and his brother-in-law, Jonathan Howgate, have begun to work for the parent holding company with a mission to diversify the family's holdings primarily by acquiring unrelated operating businesses. Ian also has a Bachelor of Arts in Economics from Wesleyan University and has served on the board of the Cedar Rapids Opera Theater.

BOBBY SAGER • *Founder, Sager Family Traveling Foundation & Roadshow, MA, USA*

Bobby is a tough-minded businessman who made a fortune by seeing opportunity where others have not. He was a driving force behind the spectacular growth of Gordon Brothers Group, a preeminent global financial services business that now conducts over \$20 billion of transactions annually with offices in North America, Europe and Asia. In 2000, Bobby, his wife Elaine, daughter Tess and son Shane, founded the Sager Family Travelling Foundation and Roadshow. Now, more than three-dozen trips later, the Sagers have established their own special brand of hands-on, eye-ball to eye-ball philanthropy. For an overview on the initiatives please visit www.teamsager.org.

JAMES K. CORNELL • *Seventh-Generation Owner, Cornell Door Solutions (Founded 1828), & Managing Partner, Fiduciary Wealth Partners, MA, USA*

James Cornell is a founder and managing partner of Fiduciary Wealth Partners, an investment advisory and consulting firm to family businesses and family offices. He serves on the boards of several for-profit businesses and non-profit organizations and related family businesses and family offices. James is an active member of Young Presidents' Organization where he serves as chairman of the YPO Family Office Principals' Group and member of the YPO Family Business Group.

BYRN MARS • *Director on the Board, Foster Holdings, Inc., NY, USA*

Bryn Mars is thrilled to pair her knowledge of business operations and the challenges of family enterprise, in a meaningful way. She focuses on the intersection of business and family, providing structure for governance, leadership, and education, particularly as it relates to succession and the skills required to be a good steward of wealth. After earning her degree in psychology from Skidmore College, Bryn went on to serve as a high-level operations manager in the fitness industry, including chief operations officer for a boutique wellness company in the NYC area. Though business operations was her first career, Bryn was introduced to her family office at the age of 18, and quickly found an interest and love of the fine line of business and family. Bryn is an active member of the Board of Directors of her family office, and of their newest entity, FAM Legacy Solutions, an MFO Consulting Service. Previously, she served as chair of 5/4ths, a fourth-generation Foster Family Investment Group.

WANDA ORTWINE • *Chief Family Officer, Luck Companies, VA, USA*

As chief family officer, Wanda Ortwine leads the family office, which supports a multi-generational family and Luck Companies in achieving their vision for the next generation. One of her key objectives is to preserve the Lucks' values and business interests from generation to generation and build for the future by counseling, educating, and preparing the next generation of Lucks for ownership and leadership. Wanda began her career with Luck Companies in 2007. Luck Companies is one of the largest producers of crushed stone in the nation. She has over 25 years of experience in working with high net worth families and family-owned businesses.

VINCENT VALERI • *Managing Director - Family Business & Legacy Advisor, Vedaera, Canada*

Vincent BA, MBM is a family business advisor. He provides strategic guidance and advice in areas of generational succession, wealth preservation, family dynamics and relationships. As a result of having grown up in and worked in a family business himself, Mr. Valeri brings his own personal experiences, struggles, learnings and insights to the families he serves. Following the sales of his family business, Vincent joined the wealth management industry where he witnessed a significant gap in how a family's wealth was being managed in relation to the management of the familial relationships and dynamics.

DR. PRAMODITA SHARMA • *Professor & Daniel Clark Sanders Chair, University of Vermont Grossman School of Business, VT, USA*

Pramodita Sharma is a professor & Daniel Clark Sanders Chair in Entrepreneurship & Family Business at the Grossman School of Business, University of Vermont. She is a visiting professor at the Kellogg School of Management's Center for Family Enterprises, Northwestern University. Her research on succession processes, governance, innovation, next generation commitment and entrepreneurial leadership in family enterprises has been honored with several international awards. Her recent book entitled *Entrepreneurial Family Firms* (w. Hoy) is being used in family business courses around the world and has been translated into Mandarin.

CALEB WHITE • *Sixth-Generation Owner, Ensign-Bickford Industries (Founded 1836) & Partner, CFAR, Inc., MA, USA*

Caleb White specializes in the complex strategic and operational issues facing today's organizations. He draws on his experience as a high impact leader in both privately-held and large public companies, at different stages of development and across multiple industries. This includes leading his sixth-generation family business, Ensign-Bickford Industries, Inc. Prior to joining CFAR, Caleb was president and CEO of Ensign-Bickford, a privately-held portfolio of diversified manufacturing companies, where he furthered expansion and spearheaded nearly ten acquisitions helping transform the portfolio into new areas. He is now a member of its Board of Directors. Caleb also serves as a director of Axiam Inc. and Brokers International, and has been a member of numerous not-for-profit boards throughout his career, including St. Mark's School of Southboro, MA and the Eugene O'Neill Theater Center, which was founded by his father.

For a complete list of speaker profiles or to register for the conference, please visit:

www.campdenconferences.com/boston

*Monday, November 27th, 2017***SPEAKER/SPONSOR RECEPTION**

Hosted at the home of Bobby Sager

*Tuesday, November 28th, 2017***CONFERENCE CHAIRS:****Patricia Saputo**, *Chief Financial Officer, Les Placements Italcant Inc.*, Canada**Irma Wang**, *Managing Director, Romar Capital*, IL, USA

- 8:00AM-8:40AM** Registration and Continental Breakfast
- 8:40AM-8:45AM** **WELCOME FROM BRIEN BIONDI, PRESIDENT, IPI & CAMPDEN WEALTH NORTH AMERICA**
- 8:45AM-9:00AM** **CONFERENCE CHAIRS' OPENING REMARKS**
- 9:00AM-9:30AM** **FAMILY OFFICES IN 2018**
Our two chairs will outline the top issues facing their families. Even though every family office is slightly different, the challenges and opportunities are still the same.
Patricia Saputo, *CFO, Les Placements Italcant Inc.*, **F. Saputo Family**, Canada
Irma Wang, *Managing Director, Romar Capital*, IL, USA
- 9:30AM-10:20AM** **FAMILY WEALTH TRANSFER CASE STUDY — NATORI**
The Natori Company, a leading women's fashion designer and manufacturer, is going through its first transfer of leadership and wealth. Ken Natori, now president, will be sharing the family's story.
Ken Natori, *President, Natori*, NY, USA
- 10:20AM-10:45AM** Networking Break & Refreshments
- 10:45AM-11:15AM** **WHY DIVERSE LEADERSHIP CREATES A BETTER FAMILY ENVIRONMENT AND INVESTMENT DECISIONS**
Diversity comes in many different facets — whether it is gender, family/non-family, or background experience. We explore the merits of diverse leadership and its implications for all family relationships.
- 11:15AM-11:45AM** **A NEW GENERATION OF UNBIASED INVESTING**
Rory Riggs, *CEO and Founder, Syntax Indices*, NY, USA
- 11:45AM-12:30PM** **DISCUSSION WITH HILLCREST CAPITAL**
We will be hearing from two third generation members whose history goes back to 1955 in Cedar Rapids.
Jonathan Howgate, *Vice President, Hillcrest Holdings*, IA, USA
Ian Smith, *Third-Generation Family Member and Vice President, Hillcrest Holdings*, IA, USA
- 12:30PM-2:00PM** Networking Lunch
- 2:00PM-3:30PM** **WORKING GROUP A: FOCUS ON THE FAMILY**
This session will focus on how families stay close, connected, and resilient, generation to generation by engaging current and future family members in a shared process of learning as the family grows. Specifically, we will share some of the best practices that families might consider when welcoming new members to the family including managing emotions that often come from a state of overwhelm as they enter this new system and the complexity that comes from wealth and family enterprise. From prenupts to legacy, we will offer ideas, practices, and possibilities that support a new family member and the family as a whole to deepen relationships and build towards a shared future.
Wanda Ortwine, *Chief Family Officer, Luck Companies*, VA, USA
- WORKING GROUP B: FROM SINGLE TO MULTI-FAMILY LEADERSHIP**
A family's wealth transfer is rarely as simple as moving assets from one principal to another in a single office. What are the ramifications to this complexity and the solutions to this new family-office dynamic?
James K. Cornell, *Seventh Generation Owner, Cornell Door Solutions & Managing Partner, Fiduciary Wealth Partners*, MA, USA
Caleb White, *Sixth-Generation Owner, Ensign-Bickford Industries, & Partner, CFAR, Inc.*, MA, USA
- 3:30PM-4:00PM** Refreshments Break

4:00PM-5:45PM **WORKING GROUP A: BEHAVIORAL RISK — COMMUNICATION AND TRUST BREAKDOWN**

This working group will help family members and their office executives address these behavior risks by helping them develop a Family Wealth Constitution, which acts a Cultural Governance document for the family.

Vincent Valeri, *Managing Director - Family Business & Legacy Advisor*, Vedaera, Canada

WORKING GROUP B: ENGAGING THE NEXT GENERATION

If you are starting to think about family succession to the point of a control hand-over then you are already too late. This interactive workshop is geared towards engaging the next generation in the family office and business.

Bryn Mars, *Director on the Board*, **Foster Holdings, Inc.**, NY, USA

6:00PM-7:30PM Cocktail Reception

7:15PM- Sponsor-Hosted Private Dinners

Wednesday, November 29th, 2017

8:15AM-8:40AM Registration and Continental Breakfast

8:40AM-8:50AM **WELCOME FROM THE CHAIRMEN****8:50AM-9:30AM** **FIRESIDE CHAT — FAMILY LEADER**

Robert heads the family business founded by his grandfather in 1917 – Radio Flyer Inc. Under Robert's innovative leadership, Radio Flyer sales have more than tripled, driven by the most new product introductions in the company's history. During this unique interview, we will be hearing the intricacies of his 20-year leadership journey.

Robert Pasin, *Chief Wagon Officer & Third-Generation Owner*, **Radio Flyer**, IL, USA

9:30AM-10:00AM **THE FIRST LINE OF DEFENSE TO SAFEGUARD YOUR REPUTATION AND PRIVACY**

There are many threats in the modern world that can undermine a good name and the ability to live a life privately. However there is plenty that can be done to protect the crucial assets of reputation and privacy. This session presents key findings from 'Private and confidential – the cyber security report' and will illustrate the link between the theft of your private data and the impact this can have on your reputation and privacy.

Allan Dunlavy, *Partner*, **Schillings**, UK

10:00AM-10:45AM **FAMILY MATTERS: A DISCUSSION OF THE HUMAN AND FINANCIAL ELEMENTS OF RUNNING A FAMILY ENTERPRISE**

Whether your long-term vision is to maintain the business within the family or to consider a sale – well-run, efficient and effective business management and operations are critical to success. During this session, we will be exploring how family relationships present an additional set of dynamics and potential complications to the equation.

Belinda Sneddon, *Managing Director*, **U.S. Trust, Bank of America Private Wealth Management**, NY, USA

10:45AM-11:15AM Networking Break & Refreshments

11:15AM-12:30PM **WORKING GROUP A: THE ART OF NAVIGATING FAMILY SUCCESSION PLANNING**

Will the process of your succession be a manageable event or a major crisis? According to a 2015 State of Succession Planning report from Halogen, the overall average succession planning score for all participants was just 48%. This failing percentage shows that something is missing, but what?

Chris Yonker, *Executive Performance Coach*, MA, USA.

WORKING GROUP B: SECRETS TO BACKING THE BEST CEOs AND PREVENTING COSTLY MISHIRES

Everybody knows that one of the biggest drivers of success in any business is backing and hiring the right people. This workshop will arm you with the necessary tools to make better hiring decisions.

J.P. Flaum, *Executive Coach & Founder*, **Green Peak Partners**, CO, USA

12:30PM-1:30PM Networking Lunch

Wednesday, November 29th, 2017 (cont.)

- 1:30PM-2:00PM** **RESEARCH RELEASE — THE GLOBAL FAMILY OFFICE REPORT 2017**
Building on the success of our research on European, Asian and North American family offices, The Global Family Office Report 2017 is Campden Wealth’s third global study — and the largest ever conducted to offer unique insights into the structures, prospects and performance of European, Asian, North American, and emerging market-based family offices.
According to the 2017 report, succession planning topped family offices’ list of priorities. This year, roughly half (47.3%) of the family offices have a succession plan in place, while a similar proportion do not (45.7%).
Dr. Rebecca Gooch, Research Director, **Campden Wealth**, UK
Joseph Battaglia, Executive Director – Global Family Office, Americas, **UBS**, NY, USA
- 2:00PM-2:45PM** **FROM SUCCESS TO SIGNIFICANCE**
Gerald Chertavian, Founder & CEO, **Year Up**, MA, USA
Introduced by: **Doug Mellinger**, Managing Director, **Clarion Capital**, NY, USA
- 2:45PM-3:30PM** **CLOSING ADDRESS BY BOBBY SAGER**
Bobby Sager, Founder, **Sager Family Traveling Foundation & Roadshow**, MA, USA
- 3:30PM** Close of Conference

Main Partners:



FEEDBACK FROM PREVIOUS CONFERENCES:

"I always look forward each year to November when Campden hosts its North American Family Office Conference. The information is always relevant and the attendees are many of the leading families from around the world. Keep up your great work!"

Family Office Executive, Canada

"I'd like to commend Campden on the quality and relevancy of the FO conference. Too many conferences can leave me talked at, or (worse) sold to. Even though at times, I didn't say much, this still felt like a conversation."

Family Office Executive, Canada

"Once again Campden brought together thought-leaders, technology visionaries, economic and political analysts, and family principals and their executives to create a highly worthwhile program. Thank you!"

Family Office Executive, IA, US

"I wanted to let you know that this was probably one of the best family office conferences I've attended. The agenda was very well thought out and beneficial to family offices. Also, the caliber of the speakers was outstanding."

Family Office Executive, IL, US

FORTHCOMING U.S. CONFERENCE:

THE 11TH AMERICAS FAMILIES IN BUSINESS CONFERENCE
MARCH 6 & 7, 2018 • THE RITZ-CARLTON COCONUT GROVE, MIAMI FL, USA

This event is eligible for CPE credits.



Organized by:

Campden Wealth

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