

FAMILY OFFICE SYMPOSIUM

MAY 23, 2023 | 11:30 AM - 7:00 PM

AMERICAN UNIVERSITY CONSTITUTION HALL CONFERENCE CENTER

Join us for an in-depth conversation with leaders of family offices and their advisors.

SCHEDULE

- 11:30 - 12:00** REGISTRATION AND BUFFET LUNCH
- 12:00 - 1:00** OPENING AND KEYNOTE PRESENTATIONS
- 1:00 - 4:30** PANEL DISCUSSIONS
- 4:30 - 5:00** WRAP UP
- 5:00 - 7:00** RECEPTION/ANNUAL MEMBERSHIP MEETING



Patricia Angus, Angus Advisory Group, LLC
Family Governance for the Family Office of the Future

PANEL DISCUSSION TOPICS

- ✓ **Nuts and Bolts of Family Office Formation** - Assuming a family has made the decision to form a family office, how does it go about doing so? This session will address the most important legal and practical issues faced by those forming a family office, including: qualifying for the SEC's Single Family Office Rule; accepting clients and readying to do business; and trade or business and other income tax issues.

MODERATOR



Ted Stein
Gordon Feinblatt LLC

CONFIRMED PANELISTS



Benjamin Berger
RSM US LLP



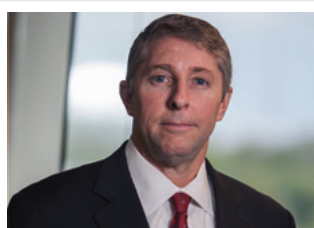
Miles Padgett
Kozusko Harris Duncan



Thomas Richardson
Arnold & Porter

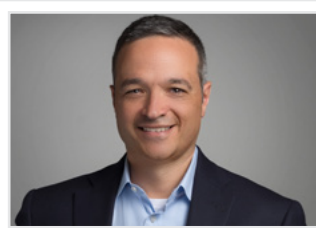
- ✓ **Private Investing by Family Offices** - Learn the latest trends in family office investing, with emphasis on private investing, whether direct investing, joint ventures or co-investing, or through individual funds or funds of funds.

MODERATOR



Steve Aucamp
Alti|Tiedemann-Global

CONFIRMED PANELISTS



Joe Del Guercio
Clark Enterprises



Scott Frederick
Sands Capital Management



Todd Rich
Declaration Partners

- ✓ **Family Office Operations** - Discover practices employed by well-run family offices to address essential issues such as cyber security and risk management, reporting to family members, confidentiality concerns, and other operational priorities.

MODERATOR

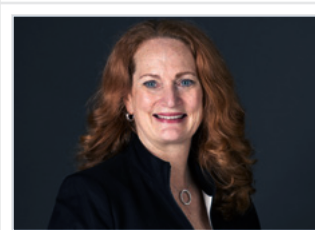


Scott Greenberg
Greenberg Wexler & Eig, LLC

CONFIRMED PANELISTS



R. Kris Coleman
Red Five Security



Erin Joe
Mandiant

REGISTRATION FEES

- Member Full Event (Including Annual Meeting/Reception): **\$95**
- Guest Full Event (Including Reception): **\$150**
- Members Only: Annual Membership Meeting*/Reception Only: **\$45**

* The Council's Annual Membership Meeting business will be conducted at the conclusion of the Symposium program and will be followed by a networking reception with all attendees.

REGISTER ONLINE AT WWW.WDCEPC.ORG

For information on the Family Office Symposium or the Washington, D.C. Estate Planning Council, contact Executive Director **Dina Land**: ✉ dina@wdcepc.org 📞 703-532-8778



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Break: **HINDMAN**
Reception/Annual Meeting: **NORTHERN TRUST**