FAMILY OFFICE CONNECT SPRING

Agenda

May 13, 2020 | Harvard Club, New York

8:00 **Networking breakfast**

8:50 **Welcome**

9:00 **Chairman's opening remarks**

Morning sessions

9:10 **A macro view of the Family Office investment climate**
The path of the current economy is somewhat of a mystery with predictions ranging from a mid-cycle slowdown to an outright recession. Industry experts will discuss the current economic and private equity investment environment for family offices; address influential factors including tech disruption and changing demographics; identify trends and critical issues that can affect a family office today, and more.

9:50 **Recession resistant portfolio construction: PE investing in a volatile market**
With an economic downturn on the near horizon, family offices are investing—or plan to invest—in alternative assets, opting for private equity. This session will address how families can construct a more recession-resistant, stronger portfolio through various approaches including realigning investment strategies, managing risk, finding durable asset classes, and heeding market warning signs.

10:30 **Keynote address: Mitzi Perdue**

10:55 **Networking break and book signing**

11:15 **Impact Investing: managing wealth and making a difference**
A growing number of family offices are entering the impact investment space and private equity has become the most common route. This session will highlight how investors can create both financial return and positive social and/or environmental impacts to achieve comparable or even better results than conventional investing.

11:55 **The shift to direct investing**
As direct investment deals increase in popularity; family offices are bypassing traditional investment pathways. The challenge is finding the right fit in terms of investments and/or partners. This session will discuss the direct-investing environment including deal flow, risks vs. rewards, capital placement, effective strategies, tax benefits and understanding the importance of cultural compatibility.

12:35 **Networking luncheon**

Afternoon sessions

1:35 **Leveraging the real estate asset class**
Real estate has become one of the most prominent investment sectors in the family office portfolio with allocations rising year over year. This session will highlight the varied aspects of real estate opportunities across property assets, vehicles, types of funds, and investment strategies.

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2:15 **Portfolio diversification with venture capital**
Venture Capital can be a prudent investment for family offices and their patient capital can benefit both the investor and entrepreneur. This panel will highlight considerations to make when placing capital into early-stage ventures include sourcing strategies, insight into investment stages, mitigating risk, previous business knowledge for hands-on approaches, and more.

2:40 **Networking break**

3:00 **Breakout sessions**

A: Private equity trends & drivers
» Putting capital to work: private debt and direct lending
» Finding and utilizing opportunities in venture capital today
» Co-investing vs. direct investing

B: Inside the Family Office
» Inhouse vs. outsourcing a CIO
» Governance and risk
» Partnering with other families

3:45

C: Focusing on Asset Classes
» Private equity vehicles
» Navigating the ESG investment space
» Deal activity in venture capital

D: Deal flow dynamics
» Sourcing strategies
» Closing quality deals
» Due diligence best practices

4:40 **Closing keynote**

5:10 **Networking cocktail reception**

PEI

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