FAMILY OFFICE CONNECT FALL

October 28 2020 | Harvard Club, New York

8:00 **Networking breakfast**

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

9:10 **Managing the market drop: Should you fear the black swan?**
Establishing a plan for "The New Abnormal" has many investors eyeing the paths of an economic recovery. Industry experts will discuss the current economic and private equity investment environment for family offices; project the recovery period and trajectory; discuss creating a plan after a crisis; offer insight into when to act on investments, and more.

9:50 **Rebalancing Your Portfolio: How Family Offices are pivoting**
With the end of the bull market upon us, many investors are looking to triage and strengthen their portfolios. This session will address how and when families should realign their portfolios, mistakes to avoid, finding durable asset classes, portfolio checks and balances; capitalizing on market opportunities, how to position for the future, and more.

10:30 **Keynote address**

10:55 **Networking break**

11:15 **Impact Investing: maintaining 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 implement ESG strategies that can not only create financial return, reflect the values of the family, and work toward the greater good.

11:55 **The shift to direct investing**
Even amidst and unsteady market, family offices are continuing to bypass traditional investment pathways and look to direct investing. 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**

1:35 **Invasion of the Next Gen: Tech-savvy, mobile and transparent**
Family offices, like most organizations, are facing some interesting times. As the next generations— Generation X and Millennials—take control, evolving themes have begun to reshape the family office. This session will highlight Next Gen trends that are expected to have significant impacts including globalization; powerful intelligence including AI and advanced automation; heightened impact investing, virtual family offices and more.

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, working with VC firms, and more.

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2:40	**Networking break**	
3:00	**Breakout sessions**	

A **Private Equity trends & drivers**

- Globalization
- Finding and utilizing opportunities in venture capital today
- Co-investing vs. direct investing
- Implementing ESG

B **Inside the Family Office**

- Inhouse vs. outsourcing a CIO
- Governance and risk
- Partnering with other families
- Harnessing and utilizing technology

3:45 **Breakout session (cont)**

C **Leveraging with Real Estate**

- Direct investing strategies
- The benefits of niche investing
- Leveraging real estate alternatives
- Examining and evaluating real estate sectors

D. **Deal Flow dynamics**

- Sourcing strategies
- Closing quality deals
- Due diligence best practices
- Approaches by asset class

4:40 **Fireside chat with Timothy O'Hara, President of the Family Office, Rockefeller Capital Management (MFO)**

5:10 **Networking cocktail reception**