

The Interactive Dialogue Series

Family Office OpsTech - New York



WEDNESDAY, MARCH 24, 2004
THE ACKERMAN INSTITUTE FOR THE FAMILY

www.fametrics.com

ADMINISTRATIVE DETAILS

Registration Fee:

\$600 includes all meals, materials and one hour of post event consulting

Payment:

By **check only** to
FAMILY OFFICE METRICS
485 Madison Avenue, 23rd floor
New York, NY 10022

Venue:

THE ACKERMAN INSTITUTE
FOR THE FAMILY
149 E. 78th Street
(at Lexington Avenue)
New York, NY 10021

Questions:

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FAMILY OFFICE METRICS
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REGISTRATION FORM

Family Office OpsTech - New York

Wednesday, March 24, 2004

The Ackerman Institute for the Family

Deadline for registration: Friday, March 5, 2004 or when **20** participant limit is met. To ensure your place at this event, we encourage you to register as early as possible.

Please photocopy registration form and send it with your check.

Name _____

Title _____

Company _____

Address _____

Phone _____

Email _____

Upon the receipt of your registration form and fee, we will be contacting you to schedule your confidential interview to help us tailor the content to your specific questions.



ABOUT THE INTERACTIVE DIALOGUE SERIES

Family Office Metrics, industry leaders on operations and technology for family offices, presents The Interactive Dialogue Series (IDS) – small group, consultative events that focus on challenges specific to the attendees’ family offices.

The IDS programs are designed to be topic-specific and highly participatory, giving attendees ability to connect to a single purpose WIFI network and share digital information during the seminar. Pre-work (in the form of a confidential interview with a Family Office Metrics principal) is required of all participants in order to create the most productive learning environment for all. Family Office OpsTech - New York will be limited to 20 individuals to create an intimate setting where practical information and new ideas can be exchanged easily.

The Family Office Metrics’ Interactive Dialogue Series is unlike other events where interaction with the speaker faculty ends at the close of the seminar. That’s because one hour of one-to-one dialogue with selected members of the IDS faculty post-event is included in the registration fee.

Family Office OpsTech - New York

OpsTech focuses on two main challenges in the administration of a family office: network applications and business rules and operations.

7:30 *Breakfast*

For those participants who have chosen to enhance their experience with Internet access, technical support will be available to connect your laptop to the single purpose WIFI network as you join our speakers and attendees for a continental breakfast. We encourage you to arrive early so that we may help you address any unforeseen difficulties before opening remarks commence.

8:30 **OPENING REMARKS**

8:45 **DOLLARIZING FAMILY OFFICE TECHNOLOGY DESIGN**

Using a comprehensive family office case study, we’ll discuss network design, optimal solutions, and the initial and on-going costs of components and services.

- Learn how to apply basic models of network design to your specific situation to achieve the best result.
- Discover how successful family offices and professional firms optimize hardware, operating systems, connectivity, administration, and help desk.

NEW TECHNOLOGIES FOR IMMEDIATE IMPACT

In this session, we’ll examine various technologies in a typical family office network environment and rate them based on immediate impact, ease of implementation, and total cost of operation.

- Get a first hand look at the tools advanced users employ to improve business management reach as well as reduce costs.
- Examine the latest browser based web applications, IP telecommunications, wireless networking, and video conferencing in use by family offices and professional firms.

TECHNOLOGY FACULTY

Gerry Washburn
Chief Technology Officer
ASSET MANAGEMENT ADVISORS, LLC

Doug Shankman
President
OTC COMMUNICATIONS, INC

12:30 *Lunch provided*

LUNCHEON SPEAKER

MASTER AND COMMANDER: TODAY’S COMPLICATED TRUST STRUCTURES DEMAND A FIRM HAND

John P.C. Duncan
Principal
DUNCAN ASSOCIATES LLC

1:45 **DOLLARIZING THE FAMILY OFFICE OPERATIONS FUNCTION**

Using a composite case study constructed from attendees’ experience, we’ll discuss the varied approaches, issues, and solutions that successful family offices use to meet the requirements of the chief investment officer, the investment committee, trustees, beneficiaries, family members, and trusted advisors.

- Take away a comparison of the most popular data aggregation and portfolio management software tools available in the market today.
- Understand how much a successful family office should pay for the key function of gathering, recording, and reporting investment data.

SUCCESSFUL FAMILY OFFICE SUPPORT PRACTICES

Using a family office composite case study based upon data gathered in the participant questionnaire, we’ll identify issues, adapt available tools and resources, and discuss alternative solutions to achieving successful family office support practices.

- Discover how successful family offices have clearly defined business processes to support strategic objectives.
- Get a clear understanding of the fundamental activities that support the functions of investment management, trust administration, and financial control in the successful family office.

OPERATIONS FACULTY

Jon Carroll
Managing Director
FAMILY OFFICE METRICS

Elaine Spang
Managing Director
FAMILY OFFICE METRICS

JK Jones
Managing Director
FAMILY OFFICE METRICS

5:00 **OPEN ARCHITECTURE AND INTERNAL CONTROLS**

John Lahey
Principal
KUZUSKO LAHEY HARRIS

5:30 *Close of seminar*

Cocktail reception
immediately following close



ABOUT FAMILY OFFICE METRICS

At Family Office Metrics we focus our consultancy on three principal markets: family offices formed or being formed by high net worth families; family offices providing financial services to multiple families; and, financial advisers who want to provide family office services. We are independent and objective in all that we do. We represent the family

and the family office exclusively, and do not accept compensation from providers or manufacturers. We are biased toward simple solutions using people, processes and technology readily available to the family. We are results oriented and team builders. We always plan the work and work the plan.