presents...

The Interactive Dialogue Series

# Family Office OpsTech 2.0– The 21st Century Family Office

WEDNESDAY, MAY 17, 2006
**THE MILLENNIUM BROADWAY HOTEL**
**NEW YORK, NEW YORK**

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## ADMINISTRATIVE DETAILS

**Registration Fee:**
**$1,100** includes all materials and breakfast, lunch and cocktails.

**Payment:**
By **check only** to
Family Office Metrics, LLC
485 Madison Avenue, 19th floor
New York, NY 10022

**Venue:**
**THE MILLENNIUM BROADWAY HOTEL**
145 WEST 44TH STREET
NEW YORK, NY 10036

**Questions:**
Jon Carroll
FAMILY OFFICE METRICS
(212) 957-2125
info@fametrics.com

## REGISTRATION FORM

Family Office OpsTech 2.0
May 17, 2006
The Millennium Broadway Hotel

Deadline for registration: : Wednesday, April 5, 2006 or when the participant limit is met.
To ensure your place at this event, we encourage you to register as early as possible.

Please complete registration form and send it with your check.

Name ______________________________

Title ______________________________

Company ______________________________

Address ______________________________

______________________________

Phone ______________________________

Email ______________________________

When we receive your registration form and fee, we will provide you with a link to our on-line benchmark questionnaire and other materials to prepare for the Workshop.

*Family Office Metrics Team (l to r): Elaine Spang, Jon Carroll, and JK Jones.*

## ABOUT THE INTERACTIVE DIALOGUE SERIES

Family Office Metrics, an industry leader on business strategy, operations, and technology in Family Offices, regularly presents "The Interactive Dialogue Series" (IDS) - small group, consultative events - focusing on challenges specific to Family Offices. The IDS programs are designed to be topic-specific and highly participatory, giving attendees the opportunity to connect with industry experts and peers in a learning environment. The number of attendees is limited to create an intimate setting where practical information and new ideas can be easily exchanged.

# The OpsTech 2.0 Workshop - The 21st Century Family Office

OpsTech 2.0 will focus on how to build and maintain an efficient and effective Family Office operating environment. Family Office executives and industry thought leaders will discuss and analyze important operating issues, identify successful strategies, and provide guidance on delivering results.

8:00 *Breakfast*

8:45 **OPENING REMARKS**
**Jon Carroll,** FAMILY OFFICE METRICS

9:00 **HOW FAMILY OFFICE EXECUTIVES RESPOND TO CHANGE**

Are you contemplating or undergoing a significant change in your Family Office business strategy, operations environment, or technology platform? Learn first-hand from a panel of Family Office executives who have recently responded to a significant change how they effectively recognized when improvements were needed, what steps they took, what tools and resources they used, and how they managed the process.

MODERATOR:
**Elaine Spang,** FAMILY OFFICE METRICS

PANEL:

| | | |
|---|---|---|
| **Don Barclay** | **Joe Marzilli** | **Tate Elliott** |
| KESWICK MANAGEMENT | GOODRICH LLC | CHILTON INVESTMENT |

10:15 *Break*

10:45 **THE 21st CENTURY FAMILY OFFICE: MEASURING SUCCESS**

How do you measure the success of your Family Office operation and technology platform? Are you able to prove the value-added of your Family Office operations to the family, the trustees, or the board of directors? Do you know how your efforts compare with those of other Family Offices? See how benchmark data illuminates our "21st Century Family Office" functional model as a tool to analyze your business performance, identify areas of opportunity, make improvements, and demonstrate the value of your Family Office to all stakeholders.

PRESENTED BY:
**Jon Carroll,** FAMILY OFFICE METRICS

12:00 *Luncheon*

1:15 **BEST PRACTICES UPDATE: REPORTING**

Today's Family Office executives must communicate swiftly and meaningfully with family members, staff, external providers, and advisers. Is your reporting answering the right questions? Are you asking all the right questions? Are you sure that the information you provide is useful? Learn how other families have used specific tools and techniques to provide more effective, accurate, and timely reporting.

PRESENTED BY:
**Tania Neild,** INFOGRATE

2:15 *Break*

2:45 **SUCCESSFUL APPROACHES TO SECURITY & PROTECTION**

Unique challenges face Family Office executives as they create and maintain a secure environment for their families. In addition to personnel and system security demands, the Family Office must also respond to the challenges of identity theft, client privacy, personal security, and asset protection. Hear practitioners describe the methods, means, systems, and controls they use to enable you to create and maintain a secure and confidential environment to protect family members and their assets.

PRESENTED BY:

| | |
|---|---|
| **Gerry Washburn** | **Doug Shankman** |
| ASSET MANAGERS ADVISORS | OTC COMMUNICATIONS |

4:00 **EFFECTIVE COLLABORATION TOOLS & PRACTICES**

Serving multiple stakeholders may be the most difficult challenge facing any Family Office: family members, trusted advisers, and external service providers all need to share information and work together. See how other Family Offices provide the framework for fostering collaboration, and implement the systems to improve the flow of information. Take away the latest designs, practices, and technology tools to improve the collaborative effort in your Family Office.

PRESENTED BY:
**Paul McKibbin,** GUGGENHEIM PARTNERS

5:15 **CLOSING REMARKS**
**Jon Carroll,** FAMILY OFFICE METRICS

5:30 *Cocktail Reception*

## ABOUT FAMILY OFFICE METRICS

Founded in 2002, Family Office Metrics is a a professional services organization, focused on ultra-high net worth individuals, private fiduciaries, and Family Offices.

We provide business consulting, development, and implementation services. We are independent, objective, and biased toward streamlined solutions.