

GENSPRING^Y
FAMILY OFFICES

2010 Men's Retreat

The Reality of Recovery—
Life in the New Normal



The Breakers
Palm Beach, Florida
May 19-21, 2010

Wednesday, May 19, 2010

2:00 pm – 5:00 pm **Registration/Hospitality**
South Loggia East

5:00 pm **Transportation to International Polo Club Palm Beach**
Hotel Lobby Please meet in the lobby of The Breakers for bus departure.

5:30 pm **Welcome Reception & Polo Demonstration**
International Polo Club
Palm Beach

6:30 pm **Dinner**
The Grande Marquee
International Polo Club
Palm Beach

Welcome & Introductions:
Michael Zeuner, Senior Executive Partner, GenSpring Family Offices

Keynote Speaker:
David S. Broder, National Political Correspondent,
The Washington Post

David S. Broder, a national political correspondent reporting the political scene for *The Washington Post*, writes a twice weekly column that covers a broad aspect of American political life. This nationally syndicated column is carried by more than 300 newspapers across the globe.

Broder is a regular commentator on CNN's Inside Politics, and makes regular appearances on NBC's Meet The Press and Washington Week in Review. He is author or co-author of six books and has received many awards for his work, including the Pulitzer Prize in May 1973 for distinguished commentary, the White Burkett Miller Presidential Award in 1989, and the prestigious 4th Estate Award from the National Press Foundation in 1990, which also honored him with the Distinguished Contributions to Journalism Award in 1993.

Thursday, May 20, 2010

8:00 am – 9:00 am **European Continental Breakfast**
Mediterranean Ballroom

9:00 am – 9:15 am **Welcome and Introductions**
Venetian Ballroom **Steve Barimo**, Chief Marketing Officer and Head of Innovation & Learning Center, GenSpring Family Offices

9:15 am – 10:30 am
Venetian Ballroom

The New Normal – Facts and Implications

Speakers:

Dennis Jacobe, Chief Economist, Gallup Poll, and
Michael Zeuner, Senior Executive Partner, GenSpring Family Offices

Much has been stated about the *New Normal*, but is this merely a catch phrase or a statistically significant state of mind of the post-meltdown consumer? Dennis Jacobe, Chief Economist for the Gallup Poll, has spent 25 years advising the leading banks and financial services firms in the country. With his experience as the backdrop, Dennis will share Gallup's most recent research about the new normal.

Dennis will be joined by Michael Zeuner who will facilitate around how this new normal is impacting the GenSpring community today, and into the future.

10:30 am – 11:00 am

Break

11:00 am – 12:30 pm
Venetian Ballroom

The New Normal – Implications on Investment and Portfolio Management

Session Host:

Michael Holden, Chief Operating Officer, GenSpring Family Offices

Speaker:

Andrew Mehalko, Chief Investment Officer, GenSpring Family Offices

12:30 pm – 1:45 pm
Mediterranean Ballroom

Luncheon

2:00 pm – 3:30 pm

Concurrent Learning Session One

Guests will have the option to choose one of the following:

Session 1-A
Ponce De Leon I
Capacity: 40

Uncle Sam Comes to Dinner: Washington's Increased Presence in the Ultra High Net Worth Family – Domestic Agenda

Session Host:

John Devine, Chairman, Mid-Atlantic Region, GenSpring Family Offices

Facilitators:

David Bokman, Chief Wealth Advisory Officer; **Steve Salley**, Senior Partner – Family Business Center & Fiduciary Services; **Tim Tallach**, Director of Financial Capital - Wealth Advisory Center; and **Pat Soldano**, President, Southern California Family Office, GenSpring Family Offices

While there is a great deal of speculation and debate about forthcoming legislative changes, little has been done to de-mystify the potential impact on families of wealth. Although there are no definitive answers, members of the GenSpring team have waded through proposed and pending legislative agendas to assess how healthcare and tax reform might affect your family enterprise.

The International Agenda will be discussed during Concurrent Session Two.

Session 1-B
Ponce De Leon II
Capacity: 30

Personal Safety: Risk Control Strategies

Session Host:

Mike Slud, President, Washington, DC Family Office

Speaker:

Paul Michael Viollis, Sr., Ph.D., CEO, Risk Control Strategies

Over Dr. Viollis' storied career in both law enforcement and security, he has developed a diverse base of expertise in various areas of the criminal justice system ranging from his position as supervisor for the New York County's District Attorney's Office Criminal Court Unit and Security Specialist/Supervisor under the United States Space Command to Commanding Officer of a Florida State Police Academy. He is a renowned public speaker and has served as a subject matter expert in workplace security, counter terrorism threat assessment, workplace violence, private client security, police training, exam validity, school violence and domestic violence.

This session will be repeated during Concurrent Session Two.

Session 1-C
Ponce De Leon III
Capacity: 60

Family Conflict: Learn What You Can Do to Help

Session Host:

Ken Russell, President, Greenwich Family Office

Facilitator:

Daisy Medici, Director of Family Governance, GenSpring Family Offices

Conflict is an actual or perceived opposition of needs, values and interests. Within a family setting, unmanaged conflict can lead to disagreement and tension among family members that can become a debilitating and deriding force to the family. Daisy will lead participants through an interactive case study designed to uncover the sources and types of conflict, suggest tools for managing conflict, and provide strategies for recovering trust in light of family conflict.

3:30 pm -4:00 pm

Break



4:00 pm - 5:30 pm

Concurrent Learning Session Two

Guests will have the option to choose one of the following:

Session 2-A

Ponce De Leon I

Capacity: 40

Uncle Sam Comes to Dinner: Washington's Increased Presence in the Ultra High Net Worth Family – International Agenda

As a continuation of session 1-A, the discussion will continue in an attempt to de-mystify the potential impact the international legislative agenda might have on families of wealth.

Session Host:

Santiago Ulloa, President, GenSpring International

Facilitators:

Steve Salley, Senior Partner – Family Business Center & Fiduciary Services, GenSpring Family Offices, **Christopher Boyette**, Partner and **Kevin Packman**, Partner, Holland & Knight, Miami

The Domestic Agenda will be discussed during Concurrent Session One.

Session 2-B

Ponce De Leon II

Capacity: 30

Personal Safety: Risk Control Strategies

Session Host:

Hunter Wilson, President, Palm Beach Family Office

Speaker:

Paul Michael Viollis, Sr., Ph.D., CEO, Risk Control Strategies

Over Dr. Viollis' storied career in both law enforcement and security, he has developed a diverse base of expertise in various areas of the criminal justice system ranging from his position as supervisor for the New York County's District Attorney's Office Criminal Court Unit and Security Specialist/Supervisor under the United States Space Command to Commanding Officer of a Florida State Police Academy. He is a renowned public speaker and has served as a subject matter expert in workplace security, counter terrorism threat assessment, workplace violence, private client security, police training, exam validity, school violence and domestic violence.

This session is a repeat from Concurrent Session One.



Session 2-C
Ponce De Leon III
Capacity: 60

Planning for the Unexpected

Session Host:

Jim Brennan, President, Sarasota and Tampa Bay Family Offices

Facilitators:

David Herritt, Family Wealth Advisor, Greenwich Family Office and
Scott Horn, Director of Client Experience - Wealth Advisory Center, GenSpring Family Offices

No one likes to be caught off guard, so how are families successfully responding and managing the planning considerations when an untimely illness, debilitating disease and or tragic event incapacitates a key family member? Specifically, what are the underlying estate and wealth transfer planning, financial and lifestyle planning as well as investment management considerations that need to be addressed? This interactive plenary session will address these issues and more through a fictitious case study that will surface a process to plan for the unexpected.

6:00 pm **Reception and Sports Bar-B-Q**

Friday, May 21, 2010

8:00 am—9:00 am **European Continental Breakfast**
Mediterranean Ballroom

9:00 am - 11:00 am **Embracing the New Normal through Goals-Based Planning –
A Facilitated Case Study**

Venetian Ballroom

Session Host:

Santiago Ulloa, President, GenSpring International

Facilitators:

Andrew Mehalko, Chief Investment Officer; **John Elmes**, Senior Partner;
Mark Feldman, Senior Partner, GenSpring Family Offices

As a critical element of “The New Normal”, investors and advisors are realigning portfolio strategies with goal-based investing that emphasizes more careful alignment of asset management with lifestyle and life-event needs. The resultant financial life plan can provide appropriate, time-driven income streams and long-range asset allocation strategies that are carefully aligned with the pre-determined success factors of multi-generational families.

11:00 am - 11:15 am **Break**

11:15 am - 12:30 pm

Concurrent Learning Session Three

Guests will have the option to choose one of the following:

Session 3-A

Ponce De Leon I

Capacity: 40

Estate Equalization:

How Do You Divide Your Estate Equally Among Heirs?

Session Host:

Bruce Arella, President, New York Family Office

Facilitators:

David Bokman, Chief Wealth Advisory Officer; and

Steve Salley, Senior Partner – Family Business Center & Fiduciary Services, GenSpring Family Offices

GenSpring's research findings indicate that the vast majority of men (97%) and women (95%) intend for their children to inherit equally; however, one's wealth transfer intentions may not always conveniently coincide with achieving that result. This learning program addresses the many challenges facing families when it comes to distributing wealth equally—exploring the estate, financial and investment planning considerations as well as the family dynamics, lifestyle and differing needs of family members.

Join us for this provocative, interactive discussion as we bring to light suggestions for families as they address the question: How do you divide your estate equally among heirs?

Session 3-B

Ponce De Leon II

Capacity: 30

Leadership and the Family Foundation:

Philanthropy Case Study

Session Host:

David Neubert, President, Nashville Family Office

Facilitators:

Bill Barbeosch, Chief Fiduciary Officer; and

Joe Rotella, Fiduciary Director & Family Wealth Advisor, GenSpring Family Offices

In this interactive discussion, we will identify the critical decision points that families have to face as they confront the best course of action to manage their family foundation, and/or dissolve it. Utilizing a case, we will discuss differences among family members from the senior generation to the next generation. The session will close by identifying some of the best practices of family philanthropy—including education, mentoring, training, communication and preparation—as learned from families who have addressed similar challenges with leadership succession for their family foundation.

Session 3-C

Ponce De Leon III

Capacity: 60

Enhancing Family Communication

Session Host:

Chris Cecil, President, Charlotte and Charleston Family Offices

Facilitator:

Jill Shipley, Director of Next Generation Education, GenSpring Family Offices

Learn strategies for how to communicate more effectively with your family through participating in activities on listening skills, recognizing biases and determining your preferred communication style. Discover more about your personal style and explore how to best communicate and interact with family members that have different preferred styles of communication. Conclude by building a SWOT Analysis related to family communication and learn strategies to enhance strengths, improve upon weaknesses, take advantage of opportunities and mitigate threats.

12:30 pm - 1:45 pm

Mediterranean Ballroom

Lunch

Session Host:

Harry Wulsin, Member, 2010 Men's Retreat Advisory Board

Luncheon Speaker:

Chris Crowley, Author of *Younger Next Year*

Fifty percent of serious illness and accidents can be avoided, forever. Seventy percent of aging (starting at age 35) is voluntary and can be avoided until the end of life. Individuals have an astonishing degree of control over the quality of their lives, including levels of optimism, effectiveness and functional age. Modern American life style is a disease for the clueless. You can get over it! Chris gives the audience a dramatic grasp of the new science of how your mind and body read idleness and movement, connection and isolation, growth or decay. As in his books, Chris will present a blend of serious, new information, with passionate motivation and humor.

1:45 pm

Wrap Up

Michael Zeuner, Senior Executive Partner, GenSpring Family Offices

2:00 pm

Adjourn

