

Private Bank



Family Office Leadership Program

June 4 - 6, 2018

Citi Center for Strategy & Executive Development
188 King Street, Armonk, NY 10504

Program Agenda

FAMILY OFFICE LEADERSHIP PROGRAM

Monday, June 4

6:30 pm **Welcome Reception**
Peter Charrington, *Global Head, Citi Private Bank*

Tuesday, June 5

7:30 am **Breakfast**

8:30 am **Welcome**
Tracey Warson, *Head of Citi Private Bank, North America*

8:35 am **Program introduction**
8:45 am Stephen Campbell, *Chairman Global Family Office, Citi Private Bank*

8:45 am **Difficult conversations – communicating with family members and principals**
9:45 am Wayne Osborne, *Koop*
Interviewed by Stephen Campbell

9:45 am **Break**

10:00 am **Global markets – a framework for understanding current events**
11:15 am David Bailin, *Global Head of Investments, Citi Private Bank*

11:15 am **Break**

11:30 am **Insiders Perspective: Planning for the worst day ever, when principals pass away**
12:00 pm David Homrich, *AMB Group*
Interviewed by Stephen Campbell

12:00 pm **Lunch – Topic: The logic of risk taking**
1:15 pm Nassim Nicholas Taleb, *Author, Incerto (The Black Swan, Fooled by Randomness, Antifragile, Skin in the Game), Veteran Trader, Distinguished Scientific Advisor Universa Investments*

1:15 pm **Break – Optional book signing with Nassim Nicholas Taleb**

1:30 pm **Elective A | Portfolio management – emerging tools and techniques**
2:30 pm Philip Watson, *Head of Global Investment Lab, Citi Private Bank*

Elective B | Aircraft – an insider take on ownership & operations
Ford von Weise, *Head of Global Aircraft Finance, Citi Private Bank*

2:30 pm **Break**

2:45 pm **Monarchies & Family Offices – A talk with Sir Stephen Lamport KCVO DL**
3:45 pm Receiver General Westminster Abbey, *Former Personal Private Secretary to HRH Prince of Wales*
Interviewed by Peter Charrington

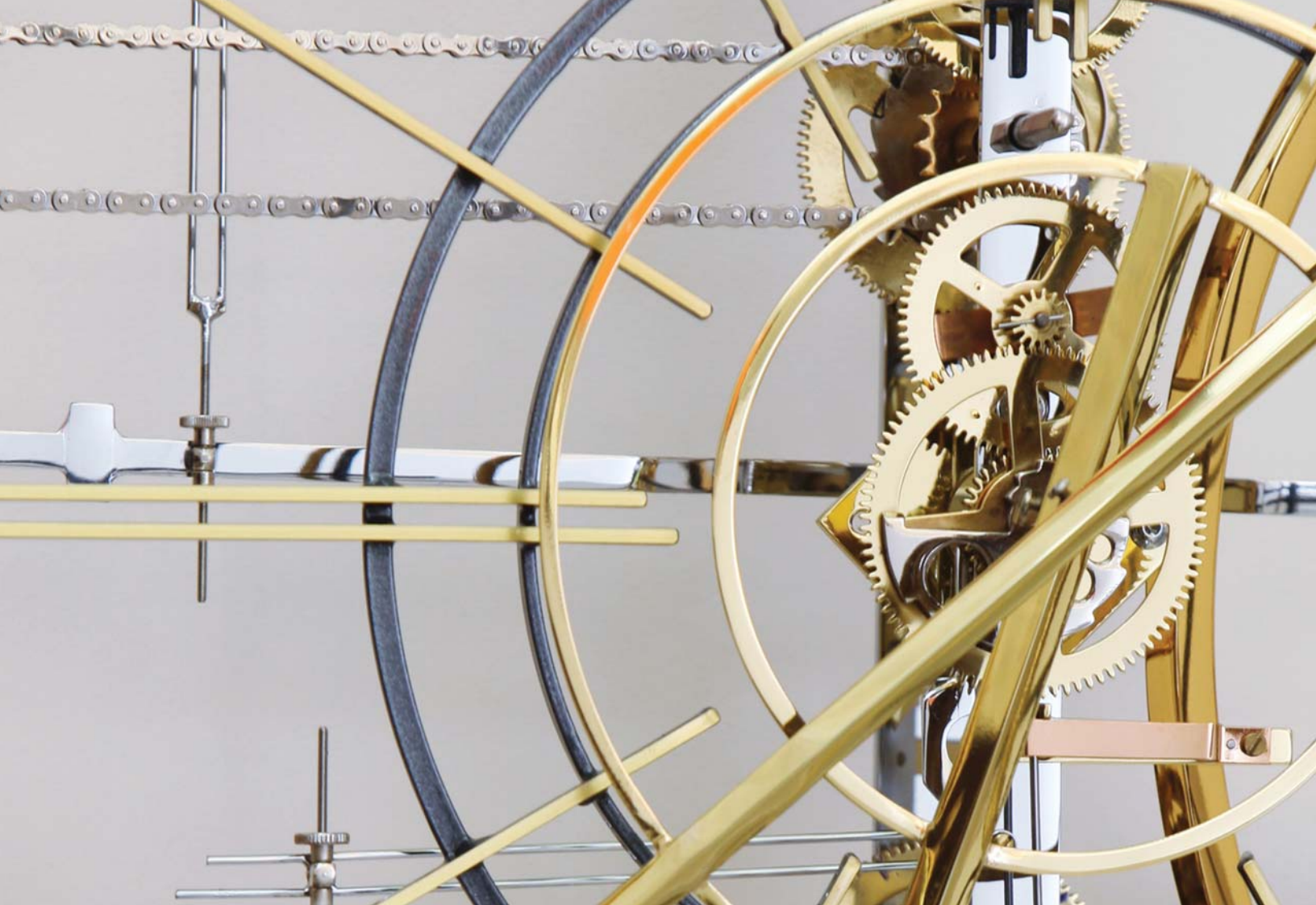
3:45 pm **Break**

4:15 pm **Managing the family ecosystem and brand**
5:30 pm Josh Bayliss, *Virgin Group*; Martyn Smith, *(formerly Dyson Family Office)*,
Brandt Vaughan, *Ballmer Group*
Interviewed by James Holder, *Head of EMEA Family Office Group, Citi Private Bank*

6:30 pm **Cocktails & Dinner**

Wednesday, June 6

- 7:30 am **Breakfast Roundtables**
8:30 am Executives representing major family offices and leading subject matter experts dialogue informally with up to twenty participants over breakfast **(sign-up required)**
- 1) Women family office executives forum**
Co-hosted by Tracey Warson, *Head of Citi Private Bank, North America* and Stephanie Luedke, *Global Head of Citi Investment Management, Citi Private Bank*
- 2) Security & cyber roundtable**
Chad Sweet, *Chertoff Group, Former Chief of Staff, Department of Homeland Security*
- 3) Direct PE & RE investing roundtable**
Stanley McCammon, *Joshua Green Corporation*
- 8:45 am **Family security in an uncertain world**
9:45 am General Michael Hayden (Ret.), *former Director of the National Security Agency, former Director of the Central Intelligence Agency*
- 9:45 am **Break – Optional book signing with General Michael Hayden**
- 10:00 am **Elective A | Exotic & educational family vacations**
11:00 am Lisa Lindblad, *Lindblad Travel Design*; Jody Bear, *Bear & Bear Travel*
Moderated by Ajay Kamath, *Director, Global Family Office, Citi Private Bank*
- Elective B | Family investment companies**
Stanley McCammon, *Joshua Green Corporation*; Bud Scruggs, *Cynosure Group*
Moderated by Stephen Campbell
- 11:00 am **Break**
- 11:15 am **Insiders perspective: Giving Back – one family’s story**
11:45 am Petr Pudil – *Founder and Chairman of Pudil Family Foundation*
Interviewed by James Holder
- 12:00 pm **Lunch – Networking**
- 1:30 pm **Blockchain – Game changer for the finance industry?**
2:45 pm Alexander Lipton, *MIT & StrongHold Labs*; Mike Novogratz, *former Principal Fortress Investment Group*; Nick Rockwell, *CTO, New York Times*
Moderated by Kristen Bitterly, *Regional Product Head of Sales, Citi Private Bank*
- 2:45 pm **Break**
- 3:00 pm **Elective A | Legal protections for family members – A practical approach to prenups, family ownership and trusts**
4:00 pm Simon Bruce, *Partner, Farrer & Co*; Laurie Ruckel, *Managing Partner, NY Office of Loeb & Loeb*
- Elective B | Synthetic Investments & Hedging – alternatives to direct investments in equities, bonds and commodities**
Gustavo Dominguez, *AdCap*
- Elective C | Impact Investing – Navigating where to start and how to create portfolio exposure**
Jennifer Kenning, *Align Impact*; Ron Cordes, *Cordes Foundation*
- 4:00 pm **Break**
- 4:15 pm **Executive compensation – A deep dive**
5:15 pm Trish Botoff, *Botoff Consulting Group*
Interviewed by Bill Woodson, *Head of Family Office Group North America, Citi Private Bank*
- 5:30 pm **Participant Networking & Wrap-up**
- 6:30 pm **Departure** – Please ensure that your plans allow you to participate through the final modules



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