Northern Trust Global Family & Private Investment Offices (GFO)
Financial Executives Group Meeting Agendas
November 20 & 21, 2024

Wednesday, November 20

6:00 PM	**FEG Member Welcome Reception & Dinner** BLVD Steakhouse 817 W. Lake Street Chicago, IL 60607 Shuttles will depart from the Kimpton Gray hotel at 5:45pm.

Thursday, November 21

Northern Trust – Global Conference Center
50 South La Salle Street
Chicago, IL 60603
Please note: Event registration will be in the Global Conference Center lobby. All sessions will allow time for Q&A.

8:00 AM	**Breakfast**
8:30 AM	**Welcome & Opening Remarks** Dino De Vita, GFO President, Northern Trust
8:40 AM	**Economic Update** *Ryan will walk us through the current state of the economy, the effects of the U.S. Presidential election and what is on the horizon for 2025.* Ryan Boyle, Chief U.S. Economist, Northern Trust
9:30 AM	**Legislation, Taxes & Estate Planning Post-Presidential Election** *Representatives from the Private Investors Coalition (PIC) will join us to provide an update on the family office legislative landscape, the Corporate Transparency Act filing deadlines, expiring exemptions, taxes, and planning opportunities for family offices to navigate post-Presidential election.* Brian Reardon, President of the S Corporation Association & Principal at Reardon Consulting, LLC David Martin, President, Foster Holdings
10:20 AM	**Networking Break**
10:30 AM	**Breakout Sessions** *Join us for small group discussions on a series of topics of interest to family office leaders. All attendees will be assigned a group to travel with among the three breakout rooms, with 30 minutes spent in each room.* 1. *Family Office Technology, with Mary Timmons* 2. *Climate & Sustainability, with Ant Stevens* 3. *What's Top-of-Mind for Family Office Leaders, with Jane Flanagan*
12:00 PM	**Lunch & Networking**

1:15 PM **Estate Planning Successes & Pitfalls**

Estate plans often get created with the best long-term thinking available at the time, but as life happens and time passes by, few families make the time to review and update their plans. This discussion will explore real stories of estate planning and estate settlement and lessons learned.

Rob Copen, President & Chief Operating Officer, Thorndale Farm, Inc.
Matthew Semansky, General Manager, Rogers Family Office
Moderated by: Gretchen Spreitzer, GFO Chief Fiduciary Officer, Northern Trust

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2:10 PM **Artificial Intelligence: Putting it into Practice**

AI continues to be a hot topic of conversation, and while many may understand what AI is and its potential across a range of applications, examples of its use within family offices remain few. This session will explore how several family offices are putting AI into practice in their offices today: what they are using AI for, why, and how they have developed a governance framework to support the use and development of AI for the family and the family office going forward.

Joe Donovan, Senior Director of Finance and Compliance, CYMI Holdings
Moderated by: Dave Petersen, GFO Head of Technology Advisory, Northern Trust

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3:00 PM **Investments, Asset Allocation & Continuation Vehicles**

This session will explore a range of topics spanning end of the year investment themes and the current market outlook, and how both are influencing asset allocation recommendations. We will then spend time on Continuation Vehicles and how these tools can be an effective component of a family office's portfolio management strategy.

Anwiti Bahuguna, Chief Investment Officer: Multi-Asset Strategies, Northern Trust Asset Management
Trish Halper, GFO Chief Investment Officer, Northern Trust
Brad Dorchinecz, Managing Director, 50 South Capital
David Fox, Partner, Leonard Green & Partners
Adam Freda, Managing Director, 50 South Capital

4:00 PM **Closing Remarks & Departures**

Fred McClendon, GFO Head of Banking, Northern Trust