

The Single Family Office

Maximizing Performance in a Complex Environment

ACADEMIC DIRECTORS: Jennifer Pendergast and Tim Kelly

SAMPLE SCHEDULE — IN-PERSON PROGRAM

		DAY 1: Tuesday	DAY 2: Wednesday	DAY 3: Thursday	
Morning		8:30am – 10:30am CT Single Family Office History and Future: An Overview Denise Kenyon-Rouvinez	8:30am – 10:30am CT Family and Business Governance: Role of the Family Office Jennifer Pendergast	8:30am – 10:15am CT Sustainable Finance Denise Kenyon-Rouvinez	
		10:45am – 12:15pm CT Single Family Office History and Future: The Rockefeller Family Office Denise Kenyon-Rouvinez	10:45am – 12:15pm CT Family Office Governance Jennifer Pendergast and Tim Kelly	10:30am – 12:00pm CT Sustainable Finance: A Live Family Case Study Denise Kenyon-Rouvinez	
		12:15pm – 1:15pm CT Lunch	12:15pm – 1:15pm CT Lunch	12:00pm – 1:00pm CT Lunch	
Afternoon		1:15pm – 3:15pm CT Effective Teamwork: Collaboration and Leadership in Flat Organizations Leigh Thompson	1:15pm – 3:15pm CT Information for Decision Making Danielle Valkner, PwC	1:00pm – 2:30pm CT Continuity Planning: Strategy and Succession Jennifer Pendergast and Tim Kelly	
		3:30pm – 5:30pm CT Cultivating Trust Adam Waytz	3:15pm – 5:15pm CT Courageous Conversations Michelle Buck		
Evening		Social Time/Dinner	Social Time/Dinner		
		Onsite Dinner – Speaker Ed Brenninkmeyer Direct investing at COFRA	Offsite Dinner		

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Consult with an Advisor:
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