



2015 FOA PUERTO RICO at the St. Regis on Bahia Beach

Sunday, Dec 6, 2015

6:00-8:00pm Oceanfront Welcome Reception Join us for cocktails and conversation at the St Regis on Bahia Beach to kick off 2015 FOA Puerto Rico.

8:00-10:00pm Group Dinners Hosted by the Economic Development Company of Puerto Rico.

Monday, Dec 7, 2015

8:00-9:00am Continental Breakfast

08:00-09:00am Pre-Program Roundtable

"Why It's Called 'Report to the Board' and not 'Report to the Table' Implications for Family Business Boards" by **Larry Stybel & Maryanne Peabody**, Co-Founders, Stybel & Peabody

09:00-09:15am Opening Remarks

Welcome from Family Office Association by **Angelo Robles**, CEO & Founder

09:15-10:15am Opening Keynote

"Myths and Realities for Families in Generational Transition," by **Mary Duke**, International Advisor to Families

10:15-10:45am Morning Break

10:45-11:45am Discussion

"Meet the Future of Investing in Private Companies," by **Alejandro Cremades**, Co-Founder & CEO, Onevest



11:45-1:30pm Luncheon & Keynote

Presentations Over Lunch

"Department of Economic Development and Commerce of Puerto Rico," by **Alberto Bacó Bagué**, Secretary of Economic Development

"Top Legal Minds Discuss the Tax Benefits of Puerto Rico & Global Tax Strategies for International Families," by **Mark H. Leeds**, Attorney, Mayer Brown

1:30-2:30pm Discussion

"International Family Office Leader Discusses: Governance. Investments. Security," by **Gordon Grant Curtis**, SFO

2:30-3:00pm Afternoon Break

3:00-4:00pm Discussion

"Technology. Cybersecurity. Artificial Intelligence. Building a New Era Family Office," by **Mark Rogozinski**, Family Office Practice, SEI

4:00-4:30pm Closing Comments

Notes from Family Office Association by **Angelo Robles**, CEO & Founder

4:30-5:30pm Closing Reception

Join us for cocktails and conversation to conclude the program

5:30-8:30pm Group Dinners

Hosted by BCMG