

PRIVATE WEALTH LATIN AMERICA & THE CARIBBEAN FORUM 2014

October 23-24
Miami, FL

InterContinental Miami



LATIN MARKETS



Private Wealth Latin America & The Caribbean Forum 2014

October 23-24 Miami, Florida InterContinental Miami

Dear Attendee,

It is with great pleasure that I invite you to join us at the 2nd Annual Private Wealth Latin America and the Caribbean Forum in Miami, Florida. This event is the leading meeting for Family Offices, Wealth Managers, Private Banks and HNWIs in the region and the flagship meeting of our private wealth series. In our second year, we will look to take conversations deeper and build on the connections that were established at our inaugural event.

- A two day summit providing updated education on asset allocation, asset protection, private client management, offshore structuring, tax, trust and estate planning
- More than 500 attendees including experts on the private client landscape from around Latin America and the Caribbean, more than 30 countries represented, including more than 100 members of a world class speaker faculty.
- An event structured around high level content and more than ten hours of targeted networking sessions.

We have put the forum together to address the needs of family members, family offices and industry leading intermediaries and will continue to strive to provide the most updated intelligence on private wealth management in Latin America.

We are looking forward to hosting you at the conference.

Regards,

Kilby Browne
Head of Private Wealth Group
Latin Markets

Discount Hotel Reservations:

\$235 per night - email to reserve: valrie.mills@ihg.com or call 1-800-327-3005 and use group code VQO

Private Wealth Series 2014

**2nd Annual
Private Wealth Latin America & The
Caribbean Forum**
Miami
October 22nd & 23rd 2014
Intercontinental Miami Hotel

**2nd Annual
Private Wealth Panama Forum**
Panama City
February 13th 2015

**3rd Annual
Private Wealth Brazil Forum**
Sao Paulo
May 13th 2015
Renaissance Hotel

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Tracing its roots back to 1865, **Sun Life Financial** is a leading international financial services organization that provides, through its affiliates, a diverse range of wealth and protection products to individuals and corporate customers. Safeguarding assets and transferring wealth are of the utmost importance to high-net worth individuals in Latin America, Asia, the Middle East and Africa, and achieving these goals requires: holding assets in stable political and economic environments, having control over transfer of wealth to heirs of choice and ensuring personal safety through confidentiality of assets. With an extensive global presence and outstanding ratings, Sun Life Financial has the strength, international expertise and solutions to help clients around the world - build, preserve and transfer wealth.

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Avior Executive Search is a boutique international executive search firm specializing in the representation of wealth management firms with a bias towards the Latin American markets. Our singular mission is to identify and understand the challenges and opportunities faced by our valued clients. We serve as trusted confidants as we secure talented individuals who actively participate in the long-term growth and success of your firm.



ARCA Capital Investments, provides investment and trading strategies for private, corporate and institutional clients. We deliver customized and collaborative investment and trading strategies. We provide perspective and focus on the LATAM fixed income markets. With a corporate viewpoint of "Global Focus, Local Reach", ARCA Capital Investments, Inc. is an independent powerhouse with a strong institutional fixed income desk and an active retail brokerage unit providing financial services expertise to high net worth individuals, institutional customers, and family offices.



Axtor Group is an independent and privately owned trust company, providing high-quality fiduciary services to select clientele. It's principal place of business is located in Curaçao, with affiliated offices in The Netherlands and associated offices in the major international business jurisdictions. Axtor Group's core business is the provision of personalized management, administration, fiduciary, consulting and corporate structuring services to natural persons and institutional clients, attending mainly the Latin America clientele. Axtor Group, together with an internal and external team of skilled professionals, is fully qualified to design and develop creative and long-term solutions for its clients. Axtor Group works and provides its services in legal environments that are politically stable, adhering to internationally required quality standards and regulations.



With 6000+ professionals covering every aspect of financial services, **The Bahamas** is one of the most developed financial centers in the world. Products and services comprise banking, private banking and trust services, investment fund administration, capital markets, investment advisory services, accounting and legal services, e-commerce, insurance, and corporate and shipping registries.



BlackRock is an independent, global investment manager. BlackRock manages assets for clients in North and South America, Europe, Asia, Australia, the Middle East and Africa. The firm employs more than 10,100 talented professionals and maintains offices in 27 countries around the world. Its client base includes corporate, public, union and industry pension plans, governments, insurance companies, third party mutual funds, endowments, foundations, charities, corporations, official institutions, sovereign wealth funds, banks, financial professionals and individuals worldwide. As of September 30th, 2012, BlackRock's AUM total \$3.67 trillion USD across equity, fixed income, cash management, alternative investment, real estate and advisory strategies.



Bloomberg, the global business and financial information and news leader, gives influential decision makers a critical edge by connecting them to a dynamic network of information, people and ideas. The company's strength – delivering data, news and analytics through innovative technology, quickly and accurately – is at the core of the Bloomberg Professional service, which provides real time financial information to more than 315,000 subscribers globally. Headquartered in New York, Bloomberg employs more than 15,000 people in 192 locations around the world.



Blue Clay Capital Management is a privately-owned, alternative investment management firm focused on identifying compelling investment opportunities in the more inefficient small-cap equity universe predominantly in North America. Through our long-term investment approach, Blue Clay aims to deliver superior absolute results. Our principals have extensive investment experience spanning multiple business cycles and managing in diverse environments. Blue Clay's management team's depth of expertise spans collectively over 50 years ranging from managing family office and hedge fund assets, private equity, activist investing, corporate development and investment banking at Goldman Sachs.



Founded in January 1989 by Edouard Carmignac, **Carmignac Gestion** is today one of Europe's leading asset managers with EUR 53 billion in assets under management. The firm is an independent company, the capital of which is held entirely by its directors, fund managers and staff. With a firm commitment to international development, our European adventure began in 1999 with the opening of a Luxembourg subsidiary. We now have seven locations in Europe and distribute our funds in 12 countries. Carmignac Gestion's range of products is also registered in Singapore for professional investors. To provide our customers with long term capital growth, we apply conviction-based management, which has proven successful for many years. Within a deliberately narrow range of funds, our expert managers aim to generate performance on all global markets while limiting risks.

SPONSORS



Columbus Frontiers is a UK FCA regulated asset manager with offices in London, Madrid, Panama City and Curacao. The company invests proprietary capital of the partners - former Goldman Sachs, JpMorgan and Permal Group as well as for third party clients mostly family offices, hedge funds, fund of funds and ultra high net worth individuals. The company focuses on direct lending, real estate and special situations.



A specialist in asset management and private banking (EUR 135.8bn under management, 2,900 employees and 31 offices throughout the world), the **Edmond de Rothschild** Group was founded in 1953. With 6 investment hubs in the world (France, Switzerland, Germany, Hong Kong, Luxembourg and the UK), Edmond de Rothschild Asset Management is positioned as an independent multi specialist investment firm. It now boasts a comprehensive offer which seeks long term performance through active investing and strong convictions based on a tradition of constant innovation. This builds on recognised areas of expertise such as European and US equities, corporate debt, multi manager, overlay management, asset allocation and quantitative asset management. The asset management division had EUR 45.5bn under management at December 31 2013 and employed 550 people including 100 investment professionals.



Henley & Partners is the global leader in residence and citizenship planning. Each year, hundreds of wealthy individuals, families and their advisors rely on our expertise and experience in this area. Our highly qualified professionals work together as one team in over 20 offices worldwide. The firm also runs a leading government advisory practice. We have raised more than US\$ 3.5 billion in foreign direct investment and been involved in strategic consulting and the design, set-up and operation of several of the world's most successful residence and citizenship programs.



Hernandez & Company is a boutique CPA firm with offices in Miami, FL specialized in accounting services, international taxation, planning and compliance for high net worth individuals and family offices of all forms and sizes. Our multilingual team of tax professionals offers a comprehensive and integrated approach to support family office administrative needs, including: investment accounting, bill payment services, payroll and human resources solutions, entity management, and general concierge services for the family.



HSBC Global Asset Management is a leading global asset management firm, with over US\$412 bil-lion* under management. Through its network of offices in over 30 countries around the world, HSBC Global Asset Management offers clients a full range of investment products including active equity, fixed income, liquidity and alternative strategies. Our objective is to manage focused investment strategies that are responsive to investor needs while delivering long-term value. A recognized leader in emerging markets, HSBC has been active in emerging markets for over 140 years and today is one of the world's largest managers of emerging markets assets with more than US\$146 billion* of assets invested in a range of local, regional and global emerging market equity and fixed income strategies. *as of June 30, 2013



Hunt Mortgage Group is one of the nation's most experienced providers of real estate financing services for multifamily housing. Hunt Mortgage Group offers both debt financing, and equity investment solutions, to meet customer needs across the United States. Today we manage \$10.4 billion of loans in our mortgage servicing portfolio on behalf of the Federal National Mortgage Association (Fannie Mae), the Federal Home Loan Mortgage Corporation (Freddie Mac), the Government National Mortgage Association (Ginnie Mae), and the Federal Housing Administration (FHA).



International Wealth Protection distinctly provides wealth protection and transfer strategies to Latin America's most affluent and the financial institutions and advisors who serve them. It is recognized for bringing creative and straightforward insurance-based solutions to this highly complex and diversified jurisdiction. Their unique Concierge approach provides Private and Corporate Clients instant access to World Renowned experts, Best of Breed providers, Competitive products and the Highest Service standards. International Wealth Protection's complete understanding of the regulatory and tax environment of the twenty different countries that make up the region, allows them to implement personalized solutions in a compliant and tax efficient manner.



INTL FCStone, through its subsidiaries, is a leader in the development of specialized financial services in commodities, securities, global payments, foreign exchange and other markets. Our revenues are derived primarily from financial products and advisory services that fulfill our clients' real needs and provide bottom-line benefits to their businesses. We create added value for our clients by providing access to global financial markets using our industry and financial expertise, deep partner and network relationships, insight and guidance, and integrity and transparency. Our client-first approach engenders trust, and has enabled us to establish leadership positions in a number of complex fields in financial markets around the world. In the US, Securities are offered through INTL FCStone Securities Inc. member FINRA/MSRB/SIPC. US-based execution, clearing and advisory services in commodity markets are offered through FCStone, LLC.



Lampe, Conway & Co, LLC is a US-based alternative investment fund manager which invests in distressed lower middle market companies in North America. Founded in 1999, the Firm targets public and private companies which have come under pressure due to excessive leverage, mismanagement or negative market perception. Targeting companies which are poorly covered by Wall Street, the Firm employs a fundamental, bottom up selection process, and invests across the capital structure. The two Principals each have over 30 years of investment experience and have historically been among the largest investors in the Firm's funds. The Team of 7 professionals has an average firm tenure of 9.5 years and come from complimentary backgrounds in out-of-court bankruptcies, debt restructurings, debtor-in-possession and exit financings, capital structure arbitrage and trading. The Firm is based in New York City and recently launched its third fund, the LC Capital Targeted Opportunities Fund.

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Since its founding in 1899 in Baltimore, **Legg Mason** has evolved into one of the largest asset management firms in the world, serving individual and institutional investors on six continents. Today's Legg Mason is a diversified group of global asset management firms ("affiliates") who are recognized for their proven investment expertise and long-term performance. The principal investment affiliates of Legg Mason are among the industry leaders in their respective areas of specialization, with unique investment approaches that have been developed over decades.



Maitland has specialised in family office work since our inception in Luxembourg in 1976. We are an independent, international group providing multi-jurisdictional legal, tax, fiduciary, investment and fund administration services to private, corporate and institutional clients, including some of the world's wealthiest families, who have entrusted us to preserve, manage, administer and grow their assets. Our approach is relationship-driven which is why many of our clients have been with us for decades. In 2012 Maitland acquired Admiral Administration, an award-winning hedge fund specialist based in Cayman Islands, Richmond USA, Nova Scotia and Halifax. Through this acquisition, Admiral clients have access to the power of an institutional fund administrator, in addition to Maitland's range of family office services. We now have \$165 assets under administration and more than 700 employees in 13 countries.



Mattos Filho, Veiga Filho,
Marrey Jr e Quiroga Advogados

Mattos Filho enjoys a reputation for providing the highest quality legal services to both Brazilian and foreign clients in support of a full range of business activities across every major industry and business sector. Our firm has a dedicated group of 60 partners and 365 associates and interns who are bound together by the same commitment to professionalism and ethical conduct that motivated our founding partners. Mattos Filho is recognized for the high quality of its services across a wide variety of practices. The firm represents domestic and foreign businesses, financial institutions, investors, non-profit organizations, governmental bodies and multilateral agencies. We offer leading practitioners in each practice area and provide a full range of legal services meeting the highest standards of expertise and efficiency.



Miami DDA is a growing destination for alternative investment companies. There are now more than 100 hedge funds, wealth management firms, private equity groups and other wealth and investment companies calling the area home. The mission of the Miami Downtown Development Authority (DDA) is to grow, strengthen and promote the economic health and vitality of Downtown Miami. As an autonomous agency of the City, the Miami DDA advocates, facilitates plans and executes business development, planning and capital improvements, and marketing and communication strategies. The Miami DDA is available to assist individuals and businesses expanding or relocating in Downtown Miami with information and connections to relevant resources.



Natixis is the corporate, investment and financial services arm of Groupe BPCE, the 2nd-largest banking group in France with 21% of total bank deposits and 36 million clients spread over two networks, Banque Populaire and Caisse d'Épargne. With more than 15,000 employees (excluding financial stakes), Natixis has a number of areas of expertise which are organized in three main business lines: Wholesale Banking, Investment Solutions and Specialized Financial Services. A global player, Natixis has its own client base of companies, financial institutions and institutional investors as well as the client base of individuals, professionals and small and medium-size businesses of Groupe BPCE's two retail banking networks. Listed on the Paris stock exchange, it has quality long-term ratings (Standard & Poor's: A / Moody's: A2 / Fitch Ratings: A).



NEXT Financial Group, Inc. is an independent broker-dealer owned by our Representatives and dedicated to providing superior customer service for your financial needs. At the heart of our company is the vision, values and voice of our 750 independent advisors. Founded in 1999 as a Representative-owned broker-dealer, NEXT is comprised of some of the industry's leading financial professionals who help customers realize their financial goals and achieve their vision. The back office support staff at NEXT provides exceptional personal service to give you the attention you deserve. NEXT was voted Broker-Dealer of the Year* by its representatives an unprecedented eight times. Our mission is simply to inspire the entrepreneurial spirit by committing ourselves to excellence and leading with the best interest of our Representatives in mind.



Old Mutual Old Mutual is an international Group which provides investment, savings, life assurance, asset management, banking and property & casualty insurance in Africa, Europe, the Americas and Asia. We have over 16 million customers and approximately 57 000 employees. Founded in 1845, we have expanded from our origins in South Africa through organic growth and strategic acquisitions. We have been listed on the London and Johannesburg stock exchanges, among others, since 1999. Aiva, founded in 1994, is member of the Old Mutual Group since 2012. Aiva operates as the regional center for financial planning in Latin America and Caribbean from its head office strategically located in Zonamerica, Uruguay.



Overseas Management Company, founded in 1955 with headquarters in Panama, offers more than 58 years of experience in corporate, fiduciary, and international business services. With a worldwide network of offices in the Americas, Asia, Europe, Middle East, and the Caribbean, OMC is able to provide an outstanding local customer service experience with access to global solutions. Our products and services include incorporations, private interest foundations, trusts, and managed structures. To help our clients achieve the control, compliance and transparency they need, we provide legal, accounting and administrative services to all the entities we domicile and manage.

SPONSORS



RBC Wealth Management

RBC Wealth Management is one of the world's top 10 largest wealth managers. It is part of Royal Bank of Canada, Canada's largest bank and one of the largest banks in the world, based on market capitalization. Operating in the Caribbean since 1972, RBC Wealth Management has offices in the Cayman Islands, Bahamas and Barbados. It provides private banking and credit, captive insurance, banking, global custody and fund administration, investment advisory, discretionary investment management, and offshore trust and fiduciary services to high and ultra high net worth individuals, family offices, corporations, life companies and fund managers. RBC Wealth Management has been voted overall Best Private Bank in the Caribbean for five years in a row in the Euromoney Private Banking and Wealth Management Survey, one of the leading global benchmarks for the industry.



RCP was founded in 2001 and is headquartered in Chicago. With approximately \$4.0 billion* of assets under management and 33 professionals, RCP is one of the largest private equity fund-of-funds sponsors focused exclusively on the lower middle market buyout sector. RCP manages over 160 partnership investments with over 90 general partners. RCP generally works with buyout fund managers with funds of between \$200 million and \$1 billion in committed capital. These fund managers then seek to invest in lower middle sized companies - typically, with \$10 million to \$250 million in enterprise value. RCP's market knowledge, investment process, and deep and long-standing relationships within the private equity community are integral to accessing and selecting the most successful fund managers.



Palisades Capital Realty Advisors is a boutique commercial real estate investment manager and advisory firm with focus in 3 areas: Commercial real estate investing and management serving high net worth and family office clients; Portfolio optimization – strategies and advisory for all facets of the real estate investment life cycle, including asset management, leasing and operations; and Energy efficiency consulting, services, benchmarking and project management – NextEdge.



Founded in 2003, **Prodigy Network** specializes in connecting its international network of individual investors with opportunities to participate in institutional grade assets. With its proven crowdfunding model and use of a third-party fund administrator, Prodigy Network has shifted real estate investment opportunities and returns to small investors. As the leader of the world's largest crowdfunded skyscraper BD Bacata, Prodigy Network has led six international and U.S. based crowdfunded projects, raised more than \$300 million from 6,200 investors, and are currently developing projects with a projected value of \$600 million. Prodigy Network's vision is to advance crowdfunding as an innovative and dynamic way of doing business through democratizing real estate investments. Prodigy Network is headquartered in New York City.



REAL ESTATE
CAPITAL PARTNERS

Real Estate Capital Partners (RECAP) was founded in 1989 and has since invested in nearly \$12 billion of U.S. real estate for institutions, family offices and high net worth individuals. The company's investments comprise over 280 properties in more than 30 states. Investments include existing and to-be-built multifamily residential, office, industrial, retail, hotel and mixed-use properties totaling over 15 million square feet of commercial space and approximately 60,000 multifamily residential units across the country with a focus on the coastal markets. Investment strategies range from core and value-add acquisitions to opportunistic joint venture developments.



Safra National Bank
of New York

Safra National Bank of New York "SNBNY" is a nationally chartered U.S. Private Bank. Headquartered in New York with branches in Florida and representative offices in Mexico, Panama, and Brazil, SNBNY is a leading international private bank with a devoted team of relationship managers serving many sophisticated, high net worth clients throughout Latin America.



Thornburg Investment Management is a privately-owned global investment firm that offers a range of solutions for retail and institutional investors. We are driven by our mission to help our clients reach their long-term financial goals through fundamental research and active portfolio management. Founded in 1982 and headquartered in Santa Fe, New Mexico, we manage approximately \$94 billion (as of December 31, 2013) across seven equity and 11 bond mutual funds, separate accounts for high-net-worth investors and institutional accounts, and five UCITS funds for non-U.S. investors.



Since our beginning in 1975, **The Vanguard Group (Vanguard)** has become one of the world's largest investment management companies. Today our clients entrust us with more than \$2.7 trillion in assets under management, divided about equally between active and passive investments. Our asset base includes \$340 billion in exchange-traded funds (ETFs). We offer locally domiciled investments in key markets around the world, and serve clients through offices in 10 countries. We attribute our growth over the past three decades to meeting our clients' needs through our client alignment, enduring investment philosophy, and emphasis on low costs.



Velocis Fund is an actively managed alternative investment strategy providing investors unique opportunities in the U.S. commercial real estate market. Our success is based on two key factors - solid principles and unwavering focus. We have built our investment strategy on three core principles: Opportunistic Deployment of Capital, Building a Recession-Resistant Portfolio and preservation of capital.



Virtus Global Funds plc is advised by Virtus Investment Advisers, Inc., an affiliate of Virtus Investment Partners. Virtus Investment Partners (NASDAQ: VRTS) is a distinctive partnership of boutique investment managers singularly committed to the long-term success of individual and institutional investors. Headquartered in Hartford, Connecticut, Virtus has the dual distinction of being recognized as one of the nation's fastest-growing independent publicly traded asset managers and a top 10 company on FORTUNE's 100 Fastest-Growing Companies list for the second consecutive year. With \$61.4 bn in AUM as of June 30, 2014, Virtus provides solutions to meet changing investor needs through a broad array of investment management products and services from a dynamic group of affiliated managers and select subadvisers, each with a distinct investment style, autonomous investment process, and individual brand.

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The Latin Private Wealth Journal is a Latin Markets weekly newsletter featuring interviews with wealth managers, family offices and members of the private wealth community active in Latin America.

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KEYNOTE SPEAKERS



George P. Bush, Political Activist, Entrepreneur & Public Servant (US)

Mr. Bush is the eldest of three children of former Florida Governor Jeb Bush; the nephew of 43rd President of the United States George W. Bush; and the grandson of 41st President of the United States George H.W. Bush. Bush co-founded Pennybacker Capital. Prior to that Bush practiced corporate and securities law with Akin, Gump, Strauss, Hauer & Feld. A US Naval Reserves Intelligence Officer. Bush's political activities commenced with the numerous campaigns of his grandfather, President George H.W. Bush, at the national level. He was also involved with three gubernatorial races in Florida in support of his father, Governor Jeb Bush, and served as a surrogate speaker for his uncle, President George W. Bush.



Ernest Dawal, Chief Investment Officer, SunTrust Banks & GenSpring Family Offices (US)

In these roles, Mr. Dawal is responsible for oversight of the investment strategy for all business units within Wealth & Investment Management and for oversight of GenSpring's investment organization. He is based in Atlanta and maintains a secondary office in Jupiter, Florida. Mr. Dawal earned a Bachelor of Arts degree in Business Administration and International Studies from the American University, Kogod School of Business & School of International Service, Washington, D.C. He earned a Master of Business Administration from Wake Forest University's Babcock School of Management, and holds a Chartered Financial Analyst (CFA) designation.



Diego Pivoz, Head of Wealth Planning - Latin America, HSBC Private Bank (US)

Mr. Pivoz is a Tax and Estate Planning Attorney with over 15 years of experience dealing with high-net worth clients in Latin America. Diego is a Director at HSBC Private Bank (Suisse) and the Head of LatAm Wealth Planning. Prior to his existing job, Diego held a number of senior management roles with the Amicorp Group in Curacao, New York and Barcelona. Diego holds a J.D. from UBA (University of Buenos Aires, Argentina) with specializations in Commercial and Corporate Law. Diego is a member of the Buenos Aires Bar and the International Bar Association and has also been awarded a Diploma in International Trust Management by the Society of Trust and Estate Practitioners (STEP).



Beatriz Sanchez, Region Head for Private Wealth Management Latin America, Goldman Sachs (US)

Ms. Sanchez is a member of the Latin America Operating Committee. She joined Goldman Sachs as managing director in 2008. Betty has 28 years of experience in the financial services industry, 24 of which are in global wealth management. Prior to joining the firm, Betty worked at HSBC Private Bank as global head of private banking for Latin America and member of the Group Private Banking Executive Committee. In 1991, she joined Republic National Bank of New York (Suisse) with the responsibility of developing the Bank's Latin American business. In 1984, she joined the Chase Manhattan Bank in New York and in 1986 as head of the Southern Cone for the private banking group.



The Hon. L. Ryan Pinder, M.P., Minister of Financial Services, Government of the Bahamas (Bahamas)

Mr. Pinder is the Minister of Financial Services in the Cabinet of the Commonwealth of The Bahamas. One of his career biggest highlights was when he won the Bye-Election in the Elizabeth Constituency in 2010 and became the Member of Parliament for the area. Subsequently, he was appointed to serve as a member of the Committee of Public Accounts of the House of Assembly of The Bahamas. He completed the six month programme for legal studies at the Eugene Dupuch Law School, Nassau Bahamas. He went on to complete his LL.M, Masters of Law in International Taxation, JD Juris Doctor, Masters of Business Administration and a Bachelor of Business Administration.



Diego Andres Molano, Director, Fundación Bavaria (Colombia)

Mr. Molano has been the Chief of Office Advisors International Affairs and Security Commission in the Colombian Senate (1994-1998), Coordinator of Plan Colombia (2003-2005), Director of Social Action Presidential Programs (2005-2008) and Joint Director for USAID's MIDAS Program (2008-present). Recently, Diego was the Director of the Colombian Institute for Family Welfare (ICBF) (2011-2013). He has a Masters in Public Administration focused on Economic Development from Columbia University, a specialization in regional integration from Universidad Javeriana and a Bachelor in Business Administration from Universidad del Rosario, and is currently Director of the Bavaria Foundation.



Alfredo Monge, President, Grupo Monge (Costa Rica)

Mr. Monge was born in Costa Rica in 1973. He is the current President of the board of one of the most important groups in Central America, Grupo Monge. The group has presence in Costa Rica, Nicaragua, Honduras, El Salvador, Guatemala and Peru. Prior to this position, Jose Alfredo served as the Secretary of the Board of Grupo Monge in 2011 and as commercial Vice President in 2008. Prior to that, he took part in the start of the group operations in Guatemala, Honduras and El Salvador where Grupo Monge acquired a recognized appliances store. Alfredo has a Law Degree from Universidad de Costa Rica in 1999 and an MBA from INCAE Business School in 2002.



Humberto Garcia de Alba, Chief Investment Strategist Private Banking, BBVA Bancomer (Mexico)

Mr. Garcia has been the Chief Investment Strategist at BBVA Bancomer since January 2008. In this role, Humberto Leads a team dedicated to design and implement investment strategy for US\$22 billion of AUMs for domestic and international markets. Prior to his current position he was Latin America Innovation and Product Development Director for BBVA Private Banking and Asset Management Latin America. He has a BSc in Economics from ITAM and an MSc en Financial Engineering from University of Reading and he is currently studying a Doctorate degree in Business Administration from Universidad Anahuac. Humberto is from Mexico.

SPEAKERS



Christopher T. Battifarano, Chief Investment Officer & Partner, Palm Equity (US)

Mr. Battifarano joined Palm Equity as Chief Investment Officer in 2012. He sets the firm's strategic and tactical asset allocations and directs manager due diligence across traditional and alternative asset classes. Previously, Mr. Battifarano worked for over ten years at GenSpring Family Offices as Senior Portfolio Strategist. He chaired GenSpring's Manager Selection Committee and was a key member of the Portfolio Allocation and Construction Committee. Mr. Battifarano has attained both the CFA and CAIA designations. He is a current board member of the CFA Society of South Florida where he leads the society's mentorship program. He received both an M.B.A. and B.B.A. degrees from the University of Miami.



Cara Williams, Global Head of Wealth Management, Mercer (UK)

Ms. Williams has been the Global Head of Wealth Management at Mercer since July 2011 and serves as its Global Head of Technology Solutions. She joined Mercer Investment Consulting as Global Chief Operating Officer in 2005. Ms. Williams has more than 17 years of experience in the pensions and investment industry. Prior to Mercer, she worked at a number of institutional asset management firms. Ms Williams began her career in finance as a financial advisor in New York with Merrill Lynch. Ms. Williams graduated from the University of Michigan, Ann Arbor, with a BA degree, and from the University of Hartford, CT, with an MBA in Finance.



Elliot Dornbusch, Founding Partner & Chief Executive Officer, CV Advisors (US)

Mr. Dornbusch is an economist and Chief Executive Officer of CV Advisors. In addition to co-founding the Firm and serving as one of the Family CIO's, Elliot Dornbusch sits on the Investment Committee where he is responsible for formulating the Firm's macro-economic view. He is also responsible for developing CV's proprietary analytic software system (VIEWS). Prior to co-founding CV Advisors, Mr. Dornbusch managed a single family office and served as the CIO of a Fund of Hedge Funds. Mr. Dornbusch graduated from Universidad Catolica Andres Bello, Venezuela, in Economics. He received a MBA with a concentration in Finance and Entrepreneurship from Olin School of Business, Babson College.



Eli Butnaru, Chief Executive Officer, Mora Wealth Management (US)

Mr. Butnaru, oversees all aspects of the company's daily operations and also works closely with clients to help create customized investment solutions. He brings to Mora his extensive knowledge and global financial perspective, which he honed during two decades of senior management experience in the international banking industry. He is credited for his leadership of major financial institutions in Latin America and Asia, including Citibank and UBS. Prior to joining Mora, Mr. Butnaru led the Palm Beach and Miami practices of UBS-AG. Mr. Butnaru, a Chartered Financial Analyst (CFA), graduated summa cum laude in 1983 from the University of Louisiana.



Marc Wenhammar, Global Investment Strategist, Grupo BBVA Private Banking (US)

Mr. Wenhammar was born and raised in Latin America (Venezuela, Ecuador, Costa Rica, Mexico). Studied at Universite de Paris II (master in Economics, post grade in International Trade and Finance). In the 1980's, consultant (based in Mexico) for industrial cooperation between French and Mexican SMEs. In 1991 joined Foreign & Colonial Emerging Markets (London) as portfolio manager-director, focusing on Latin American Securities. In 1998, joined BBVA Group, overseeing emerging markets portfolios ; in 2008 became CIO of BBVA Suiza (Zurich-private banking) ; and since 2012 , Global Investment Strategist at BBVA Global Private Banking (New York)



Jeffery J. Schutes, Senior Partner, Investments Business Leader, Growth Markets, Mercer (US)

Mr. Schutes is the Investments Business Leader for Growth Markets for Asia, Middle East, Turkey, Africa and Latin America. Appointed to this role in June 2013, he is responsible for the growth and expansion of the global investments business in these fast growing economies. Formerly, Jeff was the Global Leader of Manager Research Business and also led Mercer's Latin America Investments business providing strategic direction to the manager research boutiques and Latin America. He received his Bachelor of Science degree in Management and Finance from Purdue University. He also attended Daniel Webster College where he received an Associate of Science degree in Aviation Management.



Daniel de Fernando, Managing Partner, MDF Family Partners (Spain)

Founding and managing partner of MdF Family Partners and Chief Investment Officer for Lord North Street Limited, a company with which MdF Family Partners is closely associated. Prior to his current position, Daniel worked at J.P.Morgan from 1988 until the end of 2002 in several responsibilities in Madrid, New York, Paris, London and Geneva being eventually head of investments for Europe, Middle East and Asia for J.P.Morgan Private Banking. From 2003 until 2008 was global head of asset management and private banking of BBVA Group. Daniel is graduated in law and business administration at Universidad Pontificia Comillas (ICADE)



Dennis Miner, Managing Director, Private Wealth, NEPC (US)

Prior to joining NEPC, Dennis was a Co-Founder of Delegate Advisors, a new multi-family office. Prior to that, Dennis was a Co-Founder and Managing Director of Morgan Creek Capital Management and led the marketing and client service teams. During his tenure, Morgan Creek grew from \$500 million of assets under advisement in June 2004 to over \$9 billion in March 2010. Dennis has over 17 years of experience serving the investment needs of wealthy individuals and families, including 9 years at Credit Suisse First Boston and Donaldson, Lufkin & Jenrette. As a Director in the CSFB Private Client Group, Dennis was responsible for over 60 relationships with clients having a net worth of \$100 million each.

SPEAKERS



Mary Oliva, Founder & President, International Wealth Protection (US)

Insurance industry veteran, Mary Oliva has over twenty years experience providing wealth protection and transfer strategies to Latin America's most affluent individuals via the institutions and advisors who serve them. She is a globally recognized expert with a track record of accomplishments that include formation of insurance companies, market entry, business development, corporate and individual relationship management, strategic planning and compliance. Her unique area of expertise has prompted her participation at many international insurance symposiums and conferences sponsored by insurance companies, global financial institutions and law firms.



Sven Stumbauer, Director of Financial Crimes Compliance – Latin America, AlixPartners (US)

Sven leads the Financial Crimes Compliance practice for Latin America both in terms of consulting and solution delivery in the U.S. and Latin America. Sven's industry experience includes domestic and international banks, broker/dealers, insurance companies, trust companies, and hedge funds, focusing on financial crime matters, regulatory compliance, fraud, Anti-Money Laundering and Office of Foreign Assets Control (OFAC) compliance. Sven has also provided expert guidance to leading financial institutions and their boards of directors on compliance with the Bank Secrecy Act (BSA), the U.S.A. Patriot Act, OFAC regulations, Foreign Account Tax Compliance Act (FATCA) and the Foreign Corrupt Practices Act (FCPA).



Fernando Levi Hara, Chief Executive Officer, Mckafka Development Group (US)

Mr. Levy Hara studied at University of Buenos Aires and Universidad Torcuato Di Tella (MBA in Architecture and Urban Economy). He also graduated from the AMD Program in Real Estate at Harvard University Graduate School of Design. Levy Hara is the Co-Founder, Managing Partner and CEO of Aventura, Florida-based Mckafka Development Group. Levy Hara is a contributor and guest columnist for several real estate publications. He has co-authored "El Arte de Financiar Proyectos Inmobiliarios", published in Argentina in 2010. He is Professor of Real Estate Development in the Master in Urban Economy at Universidad Di Tella in Buenos Aires, and he is a LEED-AP certified by the US Green Building Council.



Michael Blank, Managing Director, Andbank Miami (US)

Mr. Blank is the Managing Director of Andbank, Miami as of January 1, 2014. Andbank is the largest family owned private bank in Andorra. He was previously the founder of Swiss Asset Advisors, a multi family office located in Zug and Miami. He has been an International private banker for the past 23 years, during which time he established Bank Julius Baer in Palm Beach and Credit Suisse Private Advisors in Miami, Florida. Michael remains active in advising private clients, corporations and institutions with wealth preservation planning. He is a member of the Florida Bar, Society of Trust and Estate Professionals (STEP), and Florida International Bankers Association (FIBA).



Sergi Lucas, Chief Executive Officer, Banca Privada d'Andorra (Panama)

For the last four years Mr. Lucas has been developing his career as Managing Director and Chief Executive Officer of Banca Privada d'Andorra Panama and Banca Privada d'Andorra Valores. During this time, he has been responsible for creating and establishing the Panamanian branch of Banca Privada d'Andorra and its brokerage firm. He is also the Managing Director of BPA International Trust, their trustee company. Sergi is from Andorra (Europe). He holds a degree in Business Administration from the Escuela de Administración de Empresas (EAE - Barcelona) and he speaks Spanish, English, French and catalan.



Ira J. Perlmutter, Managing Director, T5 Equity Partners (US)

Mr. Perlmutter is the Head of Private Equity and Venture Capital for a single family office (SFO). Acquired and serve as Chairman of five portfolio companies. Advise family on attractive fund investments, special situations, etc. Sourced and acquired bank for the family; serve as Special Advisor to the Chairman, Chairman of the Credit Committee and as a Director. Prior to that he served as Secretary at Lexington Healthcare Group. He also founded and ran Cove Capital Advisors and served as its Managing Director. Mr. Perlmutter received a B.A. from Brandeis University in 1985 and an MBA in Finance from the Stern School of Business at New York University in 1991.



Audrey Robinson, Chief Investment Officer, Water Street Family Offices (Canada)

Audrey has over 25 years of experience working with families and individuals where she has focused on the development and implementation of customized investment manager strategies, portfolios and investment policies. As the CIO, Audrey has the primary responsibility for the development and implementation of WaterStreet's unique multi-manager platform and risk-based approach to portfolio construction. Audrey's experience has also included managing the portfolios and relationship of both private clients and institutions including not-for-profit corporations and foundations. Audrey is currently the Chair of the Independent Review Committee for the Social Housing Services Corporation.



Patricia Brown, Director, Graduate Program in Taxation, University of Miami School of law (US)

Ms. Brown began her career at Cleary, Gottlieb, Steen and Hamilton, where she specialized in the tax treatment of cross-border financial transactions and financial institutions. She moved to the U.S. Treasury Department in 1994, and in 1997 became the Deputy International Tax Counsel (Treaty Affairs), with responsibility for co-ordinating U.S. tax treaty policy. From 2007 to 2011, she was a consultant to the Organisation for Economic Co-operation and Development, working on a project to increase the likelihood that collective investment vehicles and other portfolio investors will actually receive tax treaty benefits.

SPEAKERS



Thomas Balcom, Founder, 1650 Wealth Management (US)

Mr. Balcom is the Founder of 1650 Wealth Management. 1650 Wealth Management is a Fee-only registered investment advisory firm with offices in Miami and Fort Lauderdale. Tom specializes in creating and actively managing custom, comprehensive and sophisticated investment management strategies, designed to protect and grow his clients' wealth. He received his BBA and MBA from the University of Miami. Tom currently serves as a Board member for the Financial Planning Association of Greater Fort Lauderdale and as an adjunct faculty member in the Personal Financial Planning program at Barry University. Tom has been utilizing structured products in his clients' portfolios since March 2008.



Charles Krusen, Founder, Krusen Capital Management, Chief Investment Officer, Krusen Family Office (US)

Charles Krusen is the CEO of Krusen Capital Management, an advisory firm providing alternative investment solutions for high net worth individuals, family offices and wealth managers. The firm focuses exclusively on hedge funds, private equity and liquid alternatives. Mr. Krusen has 40 years experience in financial services, having begun his career with Citibank Capital Markets, specializing in arbitrage of fixed income. In addition, Mr. Krusen is the CIO of Krusen Family Office, a single family office based in Tampa, FL. Mr. Krusen is an honors graduate of Harvard College. He is on the Board of Trustees of the Southampton Hospital Foundation.



Christian Jagodzinski, Principal, Desdemona Capital (US)

After selling Telebook, a European tech company he founded, to Amazon in 1998, Christian moved from Germany to Miami Beach, launched Desdemona Capital—a single family office, and began acquiring properties. In his first of many successful transactions, Christian acquired a home for \$2.45 million, and sold the property 3 years later for \$4.5 million. In 2002 Christian founded Villazzo, combining five-star hotel services with villa rentals thus creating a new segment in the growing villa rental marketplace. Headquartered in Miami Beach with offices in St. Tropez and Aspen, Villazzo has combined five-star hotel services with villa rentals, creating a unique luxury vacation experience.



Marcos García, Head of Family Office & Partner, Capital Advisors (Chile)

Mr. García is a Partner of the Chilean Family Office Capital Advisors, a pioneer in advising high net worth families in managing their financial investment company. Prior to this role, Marcos served as Director of Global Wealth Management - Chile for Merrill Lynch Wealth Management, and Chief Investment Officer for Banchile, between 2008 and 2010. From 2001 until 2008, he served as Manager and Deputy Manager of Corporate Finance at Banchile and Santander respectively. He holds an industrial engineering degree from the Catholic University of Chile and an MBA from MIT Sloan School of Management.



Lucelly Dueñas, Senior Vice President and Associate Fiduciary Counsel, Bessemer Trust (US)

Ms. Dueñas is responsible for advising ultra-high-net-worth families as they navigate the complexities of wealth, with a specific focus on cross border and international matters related to legacy planning, family governance, tax minimization strategies, and the implementation of estate plans. Prior to joining Bessemer in 2014, Ms. Dueñas was a Wealth Advisor at J.P. Morgan Private Bank, where she worked with high-net-worth Latin American families on the strategic planning of their wealth. Ms. Dueñas earned an LL.M. in Estate Planning from the University of Miami School of Law, a J.D. from Indiana University School of Law, and a B.S. in Psychology and a B.A. in Criminology from the University of Florida.



David Fernández Tavares, Deputy Head of LatAm, Off-shore Development, Carmignac Gestion (Spain)

David Fernandez Tavares has been involved in the financial services industry since 2004 and started his career at Banco de Sabadell in Barcelona, after he moved to Luxembourg to work at State Street Bank prior to join Carmignac in 2006. David started in Carmignac developing the institutional investors business in Spain and later moved into more senior roles. Since 2014, David is Deputy Head of LATAM and the US offshore business. David holds the Chartered Alternative Investment Analyst designation. David graduated from UAB, Universitat Autònoma de Barcelona in Economics. During his degree he also studied in Edhec Business School in France and Swansea University in the UK.



Jorge Becerra, Senior Partner and Managing Director, Head of BCG's Financial Services Practice in Latin America (Chile)

B.S. in Industrial Engineering, University of Buenos Aires; MBA, IESE, Barcelona; MBA Exchange Program, Kellogg Graduate School of Business, Northwestern University. Mr. Becerra has led several research reports on LatAm financial services core fields, including last 10 editions of BCG's Wealth Management report, Payments in Emerging Markets, Global Challenges and Multilatinas reports. Since 1988 Mr. Becerra has been supporting international clients in the development of national and regional strategies, joint ventures and new business opportunities throughout LatAm; profound expertise in business strategy, value management, business transformation, organization, leadership and change management.



Sergio Alvarez-Mena, Director, Credit Suisse Securities (US)

Mr. Alvarez-Mena advises CSSU's cross-border business as well as the US domestic market. Prior to Credit Suisse he was lead counsel for Morgan Stanley's Private Wealth Management division, and all U.S. based cross-border business. He also served as Head of the International Private Client Group from 2010-2013. Prior Morgan Stanley he served as lead counsel to Merrill Lynch International Latin America Private Client division and Merrill Lynch Bank & Trust (Cayman). He graduated from Georgia Military College Preparatory School 1974, Loyola University of the South B.A. (summa cum laude) 1978; and the University Of Georgia School Of Law in 1981.

SPEAKERS



Jaime Guzman-Fournier, Managing Partner, RockCoast Capital (US)

Mr. Guzmán-Fournier is Managing Partner of RockCoast Capital, and CEO of JGF Financial, Inc., firms he founded in 2014 and 2009, respectively, in La Jolla, California. RockCoast Capital makes direct company private equity investments within the lower-middle market (on behalf of a HNW family) and JGF Financial provides advisory services to private equity investors. Mr. Guzmán-Fournier received an MBA with a concentration in Finance from The Wharton School at the University of Pennsylvania an MA in International Economics and Latin American Studies from the Paul H. Nitze School of Advanced International Studies at Johns Hopkins University, and a BA in Economics from the University of Michigan in Ann Arbor.



Rodolfo Paiz, Chief Executive Officer, PT Family Office (US)

Mr. Paiz is a family-business consultant with nearly 20 years of experience in 13 countries. He has specialized in the complex multicultural and multigenerational family business systems of Latin America since 2006. He is also a third-generation member of a successful business family from Guatemala whose honorable reputation is its greatest asset. He is currently the Senior Partner at The Guayacan Group, Chief Executive Officer of the PT Family Office, and President of Fundasistemmas, among other governance roles. He has an MBA from the Thunderbird School of Global Business (ranked #1 in Global Business programs for 14 consecutive years), where he was named a Presidential Scholar.



Alejandro Santos, Head of Global Wealth Solutions, Itau Private Bank International (US)

Mr. Santos is currently the US Head of Global Wealth Solutions for Itaú Private Bank International. He leads the trading desk, treasury and products divisions and the Hispanic advisory team for Spanish-speaking Latin America, based in Miami. Prior to this position he was Head of Private Banking in Argentina and Head of the Advisory and Strategy Team for the Southern Cone. Before joining Itaú, Mr. Santos had a 10-year tenure at Boston Asset Management where he was the Head of Portfolio Management. He holds a Bachelor in Business Administration and a CPA from the Universidad Católica Argentina and a Masters in Finance from the Centro de Estudios Macroeconómicos de Argentina.



Guayana Páez-Acosta, Executive Director, Avina Americas, Director, Fundacion Avina (US)

Ms. Páez-Acosta has 16+ years of professional practice, combining research and technological knowledge with management experience in the fields of development, conservation and capacity building, and proven success engaging multiple stakeholders. She holds a Master of Science in Environment and Sustainable Development from University College London, UK and is sociologist from Andres Bello Catholic University, Venezuela. She has worked with international environmental non-governmental organizations, philanthropic and scientific institutions designing interventions in support of organizations and field programs that seek to contribute to conservation and sustainable development in Latin America.



Andrew Mehalko, Founder & Chief Investment Officer, AM Global Family Investment Office (US)

Andrew is the Founder and Chief Investment Officer of AM Global Family Investment Office and has more than 25 years of experience in the investment management industry. Prior to AM Global, Andrew was the Chief Investment Officer for GenSpring Family Offices from 1999 to 2011. He is currently on the Investment Committee Board for the University of North Carolina Greensboro Endowment Investment Fund and a member of The Economic Club of New York. Andrew received a Bachelor's degree in Finance from the University of North Carolina Greensboro and completed additional course work at Harvard University and Harvard Business School.



Santiago Ulloa, President, WE Family Offices (US)

Mr. Ulloa is the Founder and Managing Partner of WE Family Offices and is responsible for the firm's overall international business strategy. He founded the firm in 2000, then called TBK Investments, Inc., to counsel and advise high net worth families from around the world. In August of 2007, TBK joined forces with GenSpring Family Offices and he served as president of GenSpring Family Offices International. In January 2013, the firm once again became independent as WE Family Offices. Mr. Ulloa has been working with wealthy families for more than two decades. He holds a bachelor in economics from Universidad Complutense in Madrid, Spain, and an MBA Program at IESE in Barcelona, Spain.



Arturo Giacosa, Managing Director, Head of Wealth Planning, Banco Itau Europa International (US)

Mr. Giacosa leads the planning, implementation and maintenance of fiduciary structures and the development of wealth planning strategies for Itau Private Bank with offices in Miami, Bahamas, and Cayman Islands. Prior to joining Itau, Arturo held progressive leadership positions at Citibank in the wealth planning field. prior to this, Arturo served as Sr. Manager, Tax Global Wealth Services with KPMG. Arturo has over 19 years of experience in the legal, accounting and banking fields. He is an international estate planning attorney, and holds a Juris Doctorate from St. Thomas University School of Law in Miami, Florida and a Bachelor's of Science in Business Administration from Florida International University.



Pedro Vargas, Head of Legal and Structuring, Aiva (Old Mutual group) (Uruguay)

Mr. Vargas is a Uruguayan based lawyer, expert in Private Placement Life Solutions for Latin American HNW and UHNW clients. Mr. Vargas and his team of lawyers have an in depth knowledge of the legal context in each Latin American country where the PPLI structure is most efficient. He and his team are constantly travelling and providing services to family offices, banks and law firms, helping wealth planners when structuring for their own Latin American clients.

SPEAKERS



Sandro Salsano, Founding Partner, Columbus Frontiers (Panama)

Mr. Salsano is a businessman and investor. He is also the Chairman of the Salsano Family Office and Chairman of the Board of Trustees of the Salsano Shahani Foundation. Sandro was a shareholder and partner of an investment bank in the former Soviet Union, he sold his stake after Goldman Sachs became a shareholder. He started his career in London with Scottish Widows Investment Partnership. He graduated from Bocconi University in Italy and received an MBA as part of an exchange programme with the University of San Diego, California, as well as participated in the Harvard Business School's executive programme. Sandro was honoured by the World Economic Forum as a Young Global Leader.



Brendan Holt Dunn, Chief Executive Officer, Holdun Family Office (Bahamas)

Mr. Dunn is now the 5th Generation of the family to run the business, and he holds a Bachelor of Administrative and Commercial Studies, with a focus on finance, from the University of Western Ontario. Mr. Dunn is also a Chartered Portfolio Manager (CPM), a Chartered Wealth Manager (CWM), a Certified Private Equity Specialist (CPES) and a Canadian Investment Manager (CIM). Since taking over operational control and responsibility from his father, Stuart Dunn, Mr. Dunn has led the international expansion of Holdun, which now has offices in over 8 countries, and offers not only Family Office and Wealth Management services, but also Investment Banking along with Asset Protection and Trust Structures.



Jerome Dwight, Managing Director, Market Head Americas - Corporate & Institutional, RBC Wealth Management (Barbados)

Jerome oversees market strategy for solutions including captive insurance, credit, fund management, global custody, corporate trust and institutional investments. His teams serve multinationals, family offices and high net worth entrepreneurs and business owners. During his career, Jerome served as CFO for a prominent Canadian family office. Prior to RBC, he served as CEO at BNY Trust Canada, a BNY Mellon subsidiary. Jerome is a licensed Canadian Chartered Accountant and holder of the Chartered Financial Analyst and TEP designations. He received an MBA from the Schulich School of Business in Toronto and is named to the list of Canada's Top 40 Under 40™.



Alessandro Amadeu da Fonseca, Partner, Mattos Filho (Brazil)

Mr. Fonseca's practice includes tax structuring for juridical entities and individuals pursuant to Brazilian law and international treaties, with a particular focus on tax consultancy and structuring for corporate (M&A) transactions, including the law of financial reporting. Mr. Fonseca is an Adjunct Professor of Tax Law at Universidade Candido Mendes (ATAME). He has a Bachelor of Laws from Universidade São Judas Tadeu and a Specialization in Controllership and Finance, Trevisan from Escola de Negócios.



Obed Martinez, Director, Cross Asset Investment Solutions, Natixis (US)

Mr. Martinez is Head of the Cross Asset Investment Solutions Group for Natixis. He is in charge of marketing and sales of structured notes and equity derivatives for the Americas. He is based in New York, with the majority of his client base located in Latin America. Prior to joining Natixis, Mr. Martinez worked at Credit Suisse from 2005-2013 with the Latin America Sales and Structuring team. He holds an MBA in Finance from The Wharton School, University of Pennsylvania and a Bachelors of Science in Finance; Summa Cum Laude from Quinnipiac University.



James Flynn, Managing Director, Centerline Capital Group (US)

Mr. Flynn is a Senior Managing Director of Hunt Mortgage Group, Formerly Centerline Capital Group. He leads the Specialty Products Group, which is responsible for investment and lending of balance sheet capital. Mr. Flynn's responsibilities include identifying, structuring and pricing new proprietary investments, including bridge and mezzanine debt, preferred equity and JV partnership interests. Prior to joining Centerline, he practiced law at Gibson, Dunn & Crutcher, where he represented lenders, funds, developers and investors in real estate transactions. He was also an investment banker at Lehman Brothers. Mr. Flynn earned a JD from Columbia University Law School and a BS from Georgetown University.



Benjamin Reid, Head of Business Development Latin America, Maitland (UK)

Mr. Reid joined Maitland in 2013 with a primary focus on growing the group's presence in Latin America. He comes from a background of offshore private banking and structuring with a specific focus on serving UHNWI's, family offices and institutional clients. Prior to joining Maitland, Benjamin was involved in the setup of LatAm desks at 3 of the world's biggest financial institutions (BOA Merrill Lynch, RBC and HSBC) Since joining Maitland, Benjamin has grown the client base that today includes some of LatAm's most prestigious names. He forms part of a team of 6 professionals that service LatAm, including; funds and trust lawyers and administrators, private client accountants, investment and FATCA specialists.



Guillaume Poli, Deputy CEO, Global Head of Business Development, Edmond de Rothschild Asset Management (France)

Guillaume Poli is a graduate of the leading French business school ESSEC. He began his career in 1990 within the Options Division of Société Générale. In 1991 he moved to London and held various positions in the field of marketing and structuring with firms such as Nomura, Bankers Trust and Goldman Sachs, where he became Head of Credit and Fixed Income Derivatives Sales for France. In 2000, he co-founded Edmond de Rothschild Financial Services and served as Managing Director until 2007, when he was appointed Chairman of the Executive Board. In July 2009, he became Chairman of the Executive Committee of Edmond de Rothschild Investment Managers.

SPEAKERS



Sylvia Gross, Partner & Managing Director, Real Estate Capital Partners (US)

Ms. Gross grew up in Uruguay and resides in the United States since completion of her MBA. She heads Real Estate Capital Partners' real estate finance area and oversees client services activities responsible for all client reporting and visits clients on a regular basis to discuss fund performance. She has over 25 years of experience in the real estate industry having previously worked at Deutsche Bank, BHF-Bank and Louis Dreyfus Property Group with a clear focus on servicing international clients. Ms. Gross holds an MBA in Finance and International Business from New York University and a BA in Economics and German from Bucknell University.



Jon Madorsky, Managing Principal, RCP Advisors

Mr. Madorsky is a Managing Principal of RCP. He is responsible for the identification and analysis of potential investments, as well as monitoring of the Firm's current portfolio. Jon is a member of the Investment Committee and active as an Advisory Board member of various underlying funds. Jon has been involved in the private equity industry for over 10 years. Prior to joining RCP, Jon worked for two middle market buyout funds and for PricewaterhouseCoopers' Strategic Business Unit. Jon received a BA in History from Emory University and an MBA from the University of Chicago.



Maria Flávia Junqueira da Cunha, Shareholder & Managing Director, Axtor Group (Curaçao)

Ms. Junqueira is a Shareholder and Managing Director at Axtor Group. She holds a Law degree from the Pontifical Catholic University of São Paulo, Brazil, and specializes in International, Corporate, Tax and Entertainment Law. Before joining Axtor Group in 2003 she was responsible for the management and the development of trust business of HNW and Institutional clients of the Brazilian, USA, Mexican, Venezuelan and Caribbean markets at Amicorp N.V. Curaçao.



Eduardo Mora, Director, BlackRock (US)

Mr. Mora is a member of BlackRock's Global Client Group, and is part of the Latin America & Iberia region. In his current role he is responsible for managing and developing the retail offshore wealth business across the region. His service with the firm dates back to 2003, including his years with Merrill Lynch Investment Managers (MLIM), which merged with BlackRock in 2006. At MLIM, he was the lead relationship manager for all the Merrill Lynch offices in the UK, Europe and the Middle East. He began his career with MLIM as an asset manager advisor. Mr. Mora earned a BA degree with a concentration in finance and international affairs from the Externado University (Bogotá, Colombia) in 2001.



Joaquin de Monet, Founder & Managing Principal, Palisades Capital Realty Advisors (US)

In August 2013, Joaquin founded Palisades Capital Realty Advisors, a boutique commercial real estate investment management and advisory firm providing single-source investment solutions to private capital investors in the US and Latin America. Mostly recently, Joaquin served as President and CEO of Arden Realty, Inc. a national commercial real estate landlord with over \$5 Billion in assets. Prior to Arden Realty, Joaquin was responsible for GE Capital Real Estate's Mexico business. Under de Monet's leadership, GE originated loans of more than \$2.5 billion and invested \$500MM of equity, making GE Capital Real Estate the largest real estate lender/investor in Mexico at the time.



Gary Kohler, Founding Partner and Chief Investment Officer, Blue Clay Capital Management (US)

Mr. Kohler is co-founder and Chief Investment Officer of Blue Clay Capital Management. Mr. Kohler has over twenty-five years experience investing in smaller companies, generating an outstanding track record in both strong and difficult markets. Previous to Blue Clay, Mr. Kohler was a Partner and Portfolio Manager at Whitebox Advisors and he began his career managing family office assets at Okabena Company where he was Vice President and Portfolio Manager. Mr. Kohler earned an MBA from the Johnson School at Cornell University and a BA in Psychology from the University of Minnesota.



Rodrigo Nino, Chief Executive Officer & Founder, Prodigy Network (US)

Mr. Nino is revolutionizing both the real estate and crowdfunding industries by being the first to meld the two worlds. Nino developed a crowdfunding model as a safe and innovative way of giving smaller investors access to commercial real estate projects in large metropolitan areas such as New York City. With this model, he set the world record in crowd funding by summoning 4,200 investors and raising more than \$200 million in less than two years to fund the tallest building in Colombia, the BD Bacata. With Nino's direction Prodigy Network leads a range of impressive crowdfunding projects, raising 250 million dollars. These projects are worth over 650 MM in Colombia and the United States.



Amanda Stitt, Investment Director, Legg Mason Global Asset Management (US)

Amanda is an investment director at Legg Mason, and is a product specialist with a focus on fixed income. She joined Legg Mason in 2006 from Citigroup Asset Management. Amanda started her career in 1994 as a Client Service Officer with MLC. She subsequently moved to AMP in 1996 within a similar role. Amanda became an Institutional Portfolio Manager when she moved to Westpac Banking Corp in 1998 before joining Citigroup Asset Management in 2002 as an Investment Director. Amanda graduated from the University of Technology, Sydney. She has an MA in Applied Finance from Macquarie University and is a member of the SIA.

- 7:30 Registration Opens**
- 8:40 Host's Welcome**
Kilby Browne, Head of Private Wealth Group, **Latin Markets** (US)
- 8:45 Chairman's Opening Remarks**
John Coronel, Vice President, **Sun Life Financial International** (US)
- 8:55 Miami: How Local Clients are Growing Their Assets and Protecting Their Wealth**
Market leaders in the Miami private wealth market discuss which products and asset classes are proving most interesting for local clients and delve into the nuances of asset allocation strategy in the Miami market.
Panelists:
Christopher Battifarano, Chief Investment Officer, **Palm Equity** (US)
Beatriz Sanchez, Head for Private Wealth Management Latin America, **Goldman Sachs** (US)
Eli Butnaru, Chief Executive Officer, **Mora Wealth Management** (US)
Elliot Dornbusch, Founding Partner & Chief Executive Officer, **CV Advisors** (US)
Eduardo Mora, Director, **BlackRock** (US)
- 9:30 Presentation - Unstoppable Forces, Engaging Future Clients, Today**
Presenters:
John Coronel, Vice President, **Sun Life Financial International** (US)
Fidelma Farinas-Cobas, Vice President, **Sun Life Financial International** (US)
- 9:50 Presentation - Manhattan Real Estate with an ISIN Number**
International Investors can include commercial real estate in their portfolio for as little as US\$50K from their investment account (with NAV and ISIN number).
Presenter:
Rodrigo Nino, Chief Executive Officer & Founder, **Prodigy Network** (US)
- 10:20 Macroeconomic Environment and Asset Allocation**
Experts discuss the current macroeconomic environment and its implications in asset allocation as well as investment strategies.
Panelists:
David Fernández Tavares, Deputy Head of LatAm, Off-shore Development, **Carmignac Gestion** (Spain)
Marc Wenhammar, Global Investment Strategist, **Grupo BBVA Private Banking** (US)
Ernest Dawal, Chief Investment Officer, **SunTrust Banks & GenSpring Family Offices** (US)
Guillaume Poli, Deputy CEO, Global Head of Business Development, **Edmond de Rothschild Asset Management** (France)
Amanda Stitt, Investment Director, **Legg Mason Global Asset Management** (US)
- 11:00 Networking Break sponsored by **
- 11:30 Building a Family Office**
The Family Office Trend has exploded in the last five years, why are people doing it and what do they need to know?
Moderator:
Diego Martinez, Partner, **MM&A Consultants** (Uruguay)
Panelists:
Daniel de Fernando, Managing Partner, **MDF Family Partners** (Spain)
Mauricio Gruener, Owner, **GFG Capital** (US)
Ivan Carrillo, Chief Executive Officer, **Creuza Advisors** (Peru)
Brendan Holt Dunn, Chief Executive Officer, **Holdun Family Office** (Bahamas)
Marcos García, Head of Family Office & Partner, **Capital Advisors** (Chile)
- 12:10 Presentation - Private Placement Life Insurance: a "must have" for every Wealth Manager**
The world has changed and many clients are revisiting their traditional legal structures in order to adjust their wealth planning strategy to the new world. PPLI solutions are becoming more popular every day among the HNW and UHNW segment of clients, and they are "must have" financial planning tools for wealth managers.
Presenter:
Pedro Vargas, Head of Legal and Structuring, **Aiva (Old Mutual group)** (Uruguay)
- 12:40 Bahamas for Financial Services**
A Panel of Expert Professionals and Practitioners will present on the latest developments as well as other dynamic aspects of the Bahamas' regime for asset and wealth management, and the international business environment in this jurisdiction.
Panelists:
The Hon. L. Ryan Pinder, M.P., Minister of Financial Services, **Government of the Bahamas** (Bahamas)
Aliya Allen, Chief Executive Officer, **Bahamas Financial Services Board** (Bahamas)

- 1:20 Presentation: Life Insurance: a Globally Recognized & Compliant Solution**
Presenter:
Mary Oliva, Founder & President, **International Wealth Protection** (US)
- 1:40 Networking Lunch**
- 2:40 Navigating Offshore – Trusts and Structuring**
Offshore jurisdictions offer a variety of benefits and pitfalls, which jurisdiction offers the right services in the Wealth Management and Asset Protection for your clients?
Moderator:
Jerome Dwight, Managing Director, Market Head Americas - Corporate & Institutional, **RBC Wealth Management** (Barbados)
Panelists:
Maria Flávia Junqueira da Cunha, Shareholder & Managing Director, **Axtor Group** (Curaçao)
Ross Belhomme, Executive Director, **Saffery Champness** (Switzerland)
Arturo Giacosa, Head of Fiduciary and Hispanic Market Wealth Planning, **Itau Private Bank International** (US)
Harris Fried, Chief Executive Officer, **The Fried Family Office** (US)
Benjamin Reid, Head of Business Development Latin America, **Maitland** (UK)
- 3:10 Incorporating structured notes into a portfolio**
Structured Products-Investing abroad-Identifying new asset allocation opportunities to preserve and grow wealth through the use of structured products.
Panelists:
Alejandro Santos, Head of Global Wealth Solutions, **Banco Itau Private Bank International** (US)
Humberto Garcia de Alba, Chief Investment Strategist Private Banking, **BBVA Bancomer** (Mexico)
Obed Martinez, Director, Cross Asset Investment Solutions, **Natixis** (US)
Thomas Balcom, Founder, **1650 Wealth Management** (US)
Cara Williams, Global Head of Wealth Management, **Mercer** (UK)
- 3:40 Real Estate Development – Projects and Opportunities**
Wealthy Investors have driven projects around the region including here in Miami, what is driving capital in the region?
Moderator:
Paul Koch, President, **ALTASOL** (US)
Panelists:
Fernando Levi Hara, Chief Executive Officer, **Mckafka Development Group** (US)
Christian Jagodzinski, President, **Desdemona Capital** (US)
Ash Rajan, Former Chief Investment Strategist, **Merrill Lynch Wealth Management, Independent Consultant** (US)
Sergio Torassa, Chief Executive Officer, **Pronobis** (Ecuador)
Alejandro Waldman, Head of Risk Management, **Roberts Ingrey** (Argentina)
- 4:10 Networking Break**
- 4:40 Conversation on Brazil**
What are the biggest issues wealth managers in the largest economy in Latin America are facing?
Moderator:
Alessandro Amadeu da Fonseca, Partner, **Mattos Filho** (Brazil)
Panelists:
Luiz Lima, Chief Executive Officer, **Berkana Patrimônio** (Brazil)
Rogério Lot, Head of Private Bank, **Banco do Brasil** (Brazil)
Gregoire Balasko Orelío, Founding Partner, **PBA Capital** (Brazil)
Joseana Amaral, Founding Partner, **Maximizara Gestao de Patrimônio** (Brazil)
- 5:10 Private Equity Roundtable**
Which Latin American markets and sectors are offering the best returns? Direct and Fund Investments, what you need to know.
Moderator:
Jon Madorsky, Managing Principal, **RCP Advisors** (US)
Panelists:
George P. Bush, Political Activist, Entrepreneur & Public Servant (US)
Jaime Guzman-Fournier, Managing Partner, **RockCoast Capital** (US)
Gary Curry, Managing Director, **SBNC Family Office** (US)
Ira Perlmutter, Managing Director, **T5 Equity Partners** (US)
- 5:40 Presentation: The Emerging Hispanic Growth Story**
Presenter:
George P. Bush, Political Activist, Entrepreneur & Public Servant (US)
- 6:10 End of Day One – Cocktail Networking**

- 8:00 Registration Opens**
- 9:00 Host's Welcome**
- 9:05 Chairman's Opening Remarks**
Fidelma Farinas-Cobas, Vice President, **Sun Life Financial International** (US)
- 9:15 Philanthropy Roundtable - Innovations In Giving**
Emerging Trends in Latin American/Caribbean Philanthropy
Moderator:
Donzelina Barroso, Senior Philanthropic Advisor, **Rockefeller Philanthropy Advisors** (US)
Panelists:
Patricia Sierra, Executive Director, **Fundacion Pies Descalzos** (Colombia)
Diego Molano, President, **Fundacion Bavaria** (Colombia)
Guayana Páez-Acosta, Executive Director, **Avina Americas**, Director, **Fundacion Avina** (US)
Paul Velasco, Director, **Fundacion Nobis** (Ecuador)
Rafael Tomás Nazario, Executive Director, **Fundacion Central Barahona** (Dominican Republic)
Joy Olson, Executive Director, **Washington Office on Latin America (WOLA)** (US)
- 9:45 Regional Perspectives – Private Wealth in South America**
How does the industry and the need of the client differ across Latin America's broad geography?
Moderator:
Sergi Lucas, Chief Executive Officer, **Banca Privada d'Andorra** (Panama)
Panelists:
Jorge Becerra, Senior Partner, **Boston Consulting Group** (Chile)
Fernando Fort, Head of Wealth Management, **Banco de Crédito del Perú** (Peru)
Gloria Moreno, Head of Private Bank, **Banco Mercantil Santa Cruz** (Bolivia)
Juan Pablo Ruiz, Director VIP Clients, **Banco Bisa** (Bolivia)
Santiago Gutierrez, Head of Private Bank, **Banco Internacional** (Ecuador)
Mary Oliva, Founder & President, **International Wealth Protection** (US)
- 10:15 Emerging Market Exposure panel:**
What percentage of emerging market allocation should be in a portfolio and what is the best asset class to achieve the best return with minimal risk and volatility.
Moderator:
Niladri 'Neel' Mukherjee, Director – Chief Investment Office, **Merrill Lynch Wealth Management** (US)
Panelists:
Jeffery J. Schutes, Senior Partner, Investments Business Leader, Growth Markets, **Mercer** (US)
Gerhard Herrera-Pahl, Head of Investment Research, **Big Sur Partners** (US)
Luis F. Trevino, Managing Director, **Beamonte Investments** (US)
- 10:45 Networking Break**
- 11:15 Hedge Funds – Managers & Investors Meet**
Hedge Funds have long been attractive to private clients, leading managers and investors meet to discuss where the asset class stands
Moderator:
Audrey Robinson, Chief Investment Officer, **Water Street Family Offices** (Canada)
Panelists:
Oscar Alerhand, Chief Executive Office, **Galileo Investment** (US)
Santiago Ulloa, President, **WE Family Offices** (US)
Dimitris Kavalekas, Managing Director, **Strenta Investment Management** (US)
Gary Kohler, Founding Partner and Chief Investment Officer, **Blue Clay Capital Management** (US)
Andrew Mehalko, Founder & Chief Investment Officer, **AM Global Family Investment Office** (US)
- 11:45 Private Wealth in Central America**
Experts from Central America discuss the main private banking models prevailing in the region today.
Moderator:
Amanda Fonseca, Head of Private Bank, **Banco Lafise Bancentro** (Nicaragua)
Panelists:
Patricia Rodriguez Hidalgo, Head of Private Bank, **Grupo Financiero Improsa** (Costa Rica)
Maria Awilda Quintana, Head of Wealth Management, **Banco Popular de Puerto Rico** (Puerto Rico)
Alfredo Monge, President, **Grupo Monge** (Costa Rica)
Roberto Valle, Head of Private Bank, **BAC Credomatic** (El Salvador)
Lesly Tabora, Head of Private Bank, **Banco Promerica** (Honduras)

12:15 Real Estate Fund Investments

How do global and regional opportunities compare? How can private wealth investors identify hotspots and determine which markets are overheating?

Panelists:

Joaquin de Monet, Founder & Managing Principal, **Palisades Capital Realty Advisors** (US)

Sylvia Gross, Partner & Managing Director, **Real Estate Capital Partners** (US)

Camilo Niño, Partner, **Linkvest Capital - Akro Group** (US)

Antonio Moya Roman, Director, **Serpa Family Office** (Guatemala)

James Flynn, Managing Director, **Centerline Capital Group** (US)

Sandro Salsano, Founding Partner, **Columbus Frontiers** (Panama)

12:45 Networking Lunch

1:45 International Private Clients Planning Under New Realities: Tax Transparency, Automatic Exchange of Information, FATCA and Other Measures of a Post-Crisis World

The 2008 crisis might be over but its effects still linger and regulators around the world have intensified the pressure on taxpayers to be compliant and forced them to evaluate and re-think what kind of planning they are doing for their cross border investments.

Panelists:

Sven Stumbauer, Director of Financial Crimes Compliance – Latin America, **AlixPartners** (US)

Patricia Brown, Director, Graduate Program in Taxation, **University of Miami School of law** (US)

Sergio Alvarez-Mena III, Director, **Credit Suisse Securities** (US)

Diego Pivoz, Head of Wealth Planning - Latin America, **HSBC Private Bank** (US)

Lucelly Dueñas, Senior Vice President and Associate Fiduciary Counsel, **Bessemer Trust** (US)

2:15 Succession Planning: Sustaining Wealth through Generations in Latin America

Transitions are a difficult path for Families. How can the next generations overcome the traps of this process?

Moderator:

Leonardo Wengrover, Founding Partner, **W Advisors** (Brazil)

Panelists:

Michael Blank, Managing Director, **Andbank Miami** (US)

Rodolfo Paiz, Chief Executive Officer, **PT Family Office** (US)

Dennis Miner, Managing Director, Private Wealth, **NEPC** (US)

Christina Baltz, Head of Wealth Planning Americas, **UBS Wealth Management** (US)

Charles Krusen, Chief Executive Officer, **Krusen Capital Management** (US)

2:45 End of Conference

BOOKING FORM



**PRIVATE WEALTH
LATIN AMERICA &
THE CARIBBEAN
FORUM**

MIAMI, FL

OCTOBER **23-24** 2014



PRIVATE WEALTH
LATIN AMERICA &
THE CARIBBEAN FORUM

MIAMI, FL

23-24 2014



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JOB TITLE <input style="width: 80%;" type="text"/>	COMPANY <input style="width: 100%;" type="text"/>	
PHONE <input style="width: 80%;" type="text"/>	EMAIL <input style="width: 100%;" type="text"/>	
DELEGATE 2	FIRST NAME <input style="width: 80%;" type="text"/>	LAST NAME <input style="width: 80%;" type="text"/>
JOB TITLE <input style="width: 80%;" type="text"/>	COMPANY <input style="width: 100%;" type="text"/>	
PHONE <input style="width: 80%;" type="text"/>	EMAIL <input style="width: 100%;" type="text"/>	

BOOKING DETAILS **Registration is subject to approval*

Registration types

<input type="checkbox"/> Early Bird I (\$1,000) <i>Deadline June 27</i>	<input type="checkbox"/> Standard Registration (\$1,600) <i>Deadline September 30</i>
<input type="checkbox"/> Early Bird II (\$1,250) <i>Deadline July 31</i>	<input type="checkbox"/> Event Registration (\$1,850) <i>Deadline October 23</i>
<input type="checkbox"/> Pre-Event Registration (\$1,400) <i>Deadline August 29</i>	<p>Miami - Intercontinental Hotel Discount on rooms for attendees of the PW Latin America & The Caribbean Forum \$235 per night Call 1-800-327-3005 and use group code VQO or CLICK HERE</p>

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Card Type (Check One): MC AMEX VISA

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Expiration Date

CCV Code

Name of Cardholder

Address of Cardholder

Country/Zip Code

Signature

For all payments using Bank Transfers, please contact: Kilby Browne

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