

# 85 Broads

**85 Broads  
Booth GWB & CWIB  
Agenda**

**Investing with 2020 Vision: Creating your Personal Wealth Management  
Strategy for the Next Decade and Beyond**

**May 15<sup>th</sup>, 2010  
8:30am - 12:15pm  
Gleacher Center**

- 8:30 - 9:15      Registration & Breakfast
- 9:15 - 9:20      Kelly Hoey, President, 85 Broads  
Welcome Remarks
- 9:20 - 9:50      Beata D. Kirr: The Macroeconomic View  
Senior Portfolio Manager  
Bernstein Global Wealth Management
- 9:50 - 10:20     Julia Cormier: State of Alternative Investments  
Director, Alternative Investments  
Russell Investments <sup>3</sup>/<sub>4</sub> Investment Management Division
- 10:20 - 10:45    Coffee Break
- 10:45 - 11:45    Panel Discussion: Personal Wealth Management Strategy
- Craig Morgan: Portfolio Construction  
Senior Vice President - Investments  
Stifel, Nicholas & Company
- Lindsey Marcus, M.A., J.D.: Estate Planning  
Attorney - Estate Planning and Asset Protection  
Chuhak & Tecson, P.C.
- Kathy Garlow: Tax Planning  
Partner  
Shepard Schwartz & Harris LLP
- 11:45 - 12:15    Sara Hamilton: Voice of the Wealth Owner  
Founder and CEO  
Family Office Exchange (FOX)
- 12:15              Close