



Palm Beach Family Office Forum

**EAU PALM BEACH
WEDNESDAY, MAY 1, 2019**

AGENDA

Registration

Welcome

*R. Scott Beach, Chair of Corporate and Business Law Department
and Head of Family Office Practice, Day Pitney LLP*

Keynote

Thomas C. Rogerson, President/Chief Learning Officer (CLO), GenLeg Co., Inc.

Family Governance & Succession Planning

*Peter Culver, Founder, Family Legacy Council
Robert Grimaldi, Managing Director, Family Office
Wendy Rogers, Director, Griffin Family Investments, LLC
Darren M. Wallace, Partner, Trusts and Estates and Family Office Practice, Day Pitney LLP*

Tax Strategies

*N. Todd Angkatavanich, Principal, National Tax Department, Ernst & Young, LLP
Jim Brennan, Executive Director, Tax, Private Client Services, Ernst & Young, LLP
Daniel L. Gottfried, Partner, International Transactions and Tax, Day Pitney LLP*

Qualified Opportunity Zones

*Alfred J. Puchala Jr, CEO of CapZone Impact Investments LLC
Thomas Riggs, Partner, Director Financial Services Tax, PKF O'Connor Davies
Von E. Sanborn, Partner, Tax, Art Law and Family Office Practice, Day Pitney LLP
Michael Tillman, Managing Principal, PTM Partners*

Wrap up

R. Scott Beach

Cocktail Reception