

**FOR IMMEDIATE RELEASE – November 10, 2011**

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## **Industry experts to advise on best practices and main challenges at the National Family Office Forum, Jan. 30-31, Beverly Hills, Calif.**

**NEW YORK – November 10, 2011** – As family offices negotiate the current challenging economic landscape, the [National Family Office Forum](#) will convene January 30-31, 2012 in Beverly Hills, Calif., giving experts the opportunity to share dynamic industry knowledge on successful family office management and strategies.

The conference, produced by [World Research Group](#) (WRG), will offer a range of in-depth, interactive panel discussions, practical case studies and innovative networking opportunities. Specific sessions will look at current investment trends for single and multi-family offices, domestic and global market investment opportunities, and cost-benefit analysis of insourcing and outsourcing family office responsibilities and services. Other key sessions will explore how to identify and to mitigate potential risk in volatile markets and how to determine best asset allocation strategies.

Distinguished speakers include:

- **John Febert**, *Founder and Managing President*, Febert & Associates, LLC
- **Steve Braverman**, *Co-Founder and Managing Director*, Pathstone Family Office
- **Patricia Soldano**, *Chairperson, Western Region*, Genspring Family Office
- **Giovanni Petschek de Francisci**, *Portfolio Manager*, Petschek Family Office
- **Gregory Friedman**, *President and CIO*, Greycourt & Co.
- **Richard Griffin**, *Partner*, The Pritzker Group
- **Mike Kane**, *Managing Partner and Founder*, Kestrel Asset Management
- **Jeffrey Tumolo**, *Chief Investment Strategist*, Tag Associates, LLC
- **Jon Crow**, *Partner and Senior Client Advisor*, Meristem
- **Angelo Robles**, *Founder and CEO*, Family Office Association
- **Rick McDonald**, *President and CEO*, US Advisory Group

**WHAT:** The World Research Group National Family Office Forum

**WHEN:** January 30-31, 2012

**WHERE:** Beverly Hills, CA

**CONFERENCE AGENDA:** [www.worldrg.com/familyoffice](http://www.worldrg.com/familyoffice)

This event is sponsored by [Passport Capital LLC](#). Supporting associations include [Family Office Association](#), [Convention of Independent Financial Advisors](#) and [Hedge Fund Association](#).

### **About World Research Group**

World Research Group (WRG) [www.worldrg.com](http://www.worldrg.com) is a US-based conference and training development company focused entirely on providing strategies, tactics and solutions to help individuals become more successful in their professional life. We believe that there is no substitute for face-to-face learning to truly share ideas and best practices to help your organization reach its goals. Through producing more than 50 annual events, our responsibility is to create a high-quality learning and networking environment that is designed around today's professional.