

Meeting Agenda

Fath Auditorium

3pm-5pm

State of the Firm

Where is Truepoint Capital headed? How will Truepoint manage future growth? What factors are driving the increased pace of change in the family wealth industry today? How is Truepoint Capital evolving in this environment?

Evolution of Services

How are Truepoint Capital's specialty offerings advancing and expanding in light of constantly changing tax and estate legal environments, market fluctuations and the increasing importance of family dynamics?

Family Core Values

Lee Hausner, Ph.D. is an expert on the integration of wealth transfer and family core values. She will be discussing a topic which is relevant and important to all families – the importance of managing a family's human, intellectual and social capital in addition to their financial capital.

It takes time, dedication and experience to build wealth. A successful and effective family demands the same degree of discipline, planning and focus. Yet the complexity of family dynamics is not always factored into the equation. Children, grandchildren and children's spouses do not come equipped with detailed instruction manuals. No matter what stage of life you are currently in, managing your family (raising children, being a grandparent, transitioning wealth, sharing family history and traditions, etc.) is not always a smooth process. Building and maintaining a strong, healthy family may be much more difficult than building and maintaining wealth.

- Learn the benefits of developing a plan for your family, to achieve your desired results while maintaining family balance.
- Understand the importance of the qualitative aspects of wealth management to support your efforts with the quantitative side.

Alice Bimel Courtyard

5pm – 7pm

Cocktails and conversation will follow the meeting

Keynote speaker Lee Hausner, Ph.D. is a clinical psychologist, business consultant and family wealth advisor, who comes to us from IFF Advisors in Irvine, CA where she is currently the National Director of their Family Enterprise Division.