

**Florida Women in Family Office
2019 Winter Meeting
AGENDA**

**Gunster Law and Private Wealth
777 South Flagler Drive
Suite 500
West Palm Beach, FL 33401**

Tuesday, February 26, 2019

1:00 – 1:15 pm **Registration**

1:15 – 1:30 pm **Opening Remarks**
Chris Rein, Fidelity Family Office Services

1:30 – 2:15 pm **Key Note: Getting the Next Gen to Say Yes!**
This interactive discussion will focus on how to motivate the rising generation to say yes to becoming more engaged with the family office, financially responsible and productive. We will also explore what we as professionals can do so the NextGen feels welcomed and empowered.
Jill Shepley, Cresset Family Office

2:15 – 2:30 pm **Break / Social Networking**

2:30 – 4:00 pm **Smaller Concurrent Table Conversations** *(we will split into two tables for more intimate conversation with Amy and Lisa to spend 45 minutes with each table & they rotate)*

- **Family & Family Office Dynamics: Executive Coaching Tools**
Amy Brodsky, Sky Partners
- **Estate Planning – What is New and What is on your Mind?**
Lisa Schneider, Gunster Law

4:00 – 4:15 pm **Closing Remarks**
Jen Richardson, FORGE

4:15 pm **Networking Reception**
Morton's Steakhouse, 777 South Flagler Drive

The third-party speakers are independent and are not affiliated with Fidelity Investments. Fidelity Investments is not responsible for the content of their remarks, biographies, or session descriptions.

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Corporate Biographies

Amy Lynn Brodsky

Amy is the CEO and Founder of Sky Partners and its subsidiaries: Black Box Performance Coaching & Black Box Practicum, a performance coaching, facilitation and consulting firm. Amy offers performance coaching to high profile clients and CEO's of PE-backed, mid and large size companies. Additionally, she serves as a Partnership Chair of private CEO and internal PE-backed peer groups, specializing in complex partnership dynamics, high-stakes negotiations and individual coaching which ultimately leads to positive resolution, increased performance and happiness.

Amy is a nationally recognized organizational development expert with 25 years of experience in leadership, transformational change, negotiation and executive coaching across sectors. Additionally, she has led client engagements ranging from large-scale mergers and acquisitions, organizational change and cultural integrations. Her relationship management capabilities and law background have led her to drive results, which are both strategic and operationally strong within the U.S., Europe and Australia.

Lisa A. Schneider

Lisa leads Gunster's Trust & Estates practice and co-chairs the firm's Women's Leadership Forum. She focuses her practice on counseling families as to wealth preservation and transfer tax techniques, with a focus on planning for complex family structures and business succession.

Lisa devotes her expertise and proactive counseling to guide the firm's clients through complex transactions involving generations of families and succession planning for family businesses. Her extensive experience in representing wealthy individuals and their businesses includes representation of CEOs, business owners, multi-generational families, women professionals and business owners and young entrepreneurs. Lisa's responsiveness to client needs and expertise in handling complicated situations has earned her respect by both clients and the legal community. Lisa's dedication to her community is carried out by serving as a founding trustee of the Jewish Women's Foundation, chairperson of the Palm Beach Martin County Community Foundation Professional Advisory Committee, co-chair of the Jewish Federation of Palm Beach County, Jewish Professionals Network and member of the Professional Advisory Group Steering Committee of Scripps Florida.

Jill Shepley

Jill is the Senior Managing Director of Family Culture, Impact and Governance at Cresset Family Office and has 20 years' experience working with ultra-high-net-worth families and family enterprises to achieve multigenerational wealth sustainability and the successful impact of wealth.

Passionate about helping individuals and families define and accomplish their values, goals and objectives, Jill is expert in family wealth consulting, family systems, preparing next generations, communicating about wealth, navigating family enterprise transitions, family and business governance and strategic philanthropy. Jill has been awarded by Family Wealth Report as a Rising Star in the Wealth Management Industry and is a recognized keynote speaker, author and media personality, having been quoted in media such as the Wall Street Journal, Barron's, and Financial Advisor magazine. She is also an educator with extensive curriculum development experience focused on experiential learning in the areas of financial literacy, investing, wealth preservation, philanthropy, personal and professional development and family governance.

Prior to joining Cresset, Jill served as managing director, Institute for Family Culture, for Abbot Downing, where she was a family wealth consultant focused on family dynamics, education & governance, family business transitions and social impact analysis. Previous to that role, she served as director of Next Generation Education for GenSpring Family Offices, where she developed the strategic vision for GenSpring's educational offering with a mission of preparing family members for life with wealth. Jill has been on the faculty with Stetson University's School of Business where she taught courses on family businesses.

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