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Family Office **2024**  
**FINTECH SUMMIT**  
by FamilyWealthReport

# Ninth Annual Family Wealth Report Family Office FinTech Summit

October 10, 2024 8:30am – 6:00pm EST The Convene Center, 101 Park Ave, New York

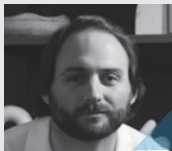
## Agenda

9.00am	Welcome	12.20pm	Lunch break
9.05am	<b>Keynote 1:</b> <i>Portfolio management insights from a unique dataset of family offices</i>	1.20pm	<b>Keynote 2:</b> TBC
9:20am	<b>Panel 1:</b> <i>Technology: Navigating Current Challenges and Future Opportunities</i>	1.30pm	<b>Panel 3:</b> <i>AI in the Accounting and Finance Functions of Your Family Office: Why and How to Embrace the Revolution</i>
9.50am	<b>Panel 2:</b> <i>Configuring the Right Tools for your Family Office: Considerations for Tech and Operations</i>	2:10pm	<b>Tech Demo:</b> Round 2
10.30am	<b>Presentation:</b> <i>Liquidity Management for Illiquid Balance Sheets</i>	3.25pm	Networking break
10.35am	Networking break	3.55pm	<b>Panel 4:</b> TBC
11:05am	<b>Tech Demo:</b> Round 1	4.35pm	<b>Fireside chat:</b> <i>Shielding the Family Fortress: The Dark Reality of Personal Security in the Digital Age</i>
		5.00pm	Summit Close Cocktail Reception

## Speakers & Presenters



**ALAN BARON**  
SS&C  
Technologies



**BEN BARRONTINE**  
360 Privacy



**ANNE BEAL**  
Deviate  
Consulting



**ALLEN BLOUNT**  
Risk Strategies



**ADAM CLELAND**  
Asora



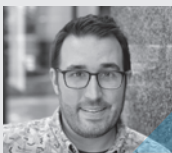
**KRISTINA CONNER**  
BPM



**RAY DENIS**  
Sandbox Wealth



**WARREN FINKEL**  
Omega Systems



**TONY GEBELY**  
Annapurna  
Cybersecurity  
Advisors



**MARK GHATAN**  
Polaris Risk



**RICK HIGGINS**  
Risclarity



**RYAN KERRY**  
Knowledge



**DANIEL LADD**  
Addepar



**ALEX LEE**  
Truewind



**ALEXANDRE LIN**  
SumIt



**SOPHIA LOH**  
Frank, Rimerman  
+ Co.



**ANDREW THOMAS**  
BILL



**STEVE WARD**  
Polaris Risk



**BILL WYMAN**  
Summitas

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