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 - Surveys/Rankings
 - Family Office Roundtables
 - Conference Coverage
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The Alliance Readies First SFO Forum

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Tom Livergood

The Family Wealth Alliance will host its first single-family office forum in October, in conjunction with its annual multi-family office forum.

The conference, slated for October 1-3 at **The James Hotel Chicago**, has set a preliminary agenda that includes topics such as decision-making after a liquidity event, generational planning, M&A and the international arena, staffing and challenges in the industry (www.FWAlliance.com). The agenda also includes a peer roundtable discussion between MFO and SFO heads, said ceo **Tom Livergood**. The conference will also unveil the results of its inaugural SFO study, which features data from SFOs on profitability, keeping top executives, scale and technology issues (*PAM*, 4/18).

Slated speakers include **M. Laird Koldyke**, chairman of MFO **Laird Norton Companies**, who will serve as keynote speaker for *Evaluating Investment Strategies for Making Next-Generation Investments on Behalf of the Family*. **Tom Handler**, chairman of the **Family Office Practice Group of Handler, Thayer & Duggan**, will lead a presentation on *Structuring the Family Office: Optimize Taxes & Minimize Risk*. The conference concludes with an SFO peer group roundtable discussion.

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