



06:09 PM, Aug. 28, 2008

[DOWNLOAD CURRENT ISSUE \(PDF\)](#)

[CORPORATE ACCESS](#)

[CONTACT US](#)

[SUBSCRIBE NOW](#)

[FREE TRIAL](#)

Search by Keyword [SEARCH](#)

Recent Issues

Search the Editorial Archive

NEWS

- Home
- Top News
- Firms & Services
- Family Office News
- Wining & Dining
- Fund Update
- Research
- FEATURES
- Heidi Nedwrth
- High Net-Worth Players of the Year
- Surveys/Rankings
- Family Office Roundtables
- Conference Coverage
- Other Special Features

RESOURCES

- Archives
- Links
- Buyer's Guides
- Rising Stars
- Events

PRODUCTS & SERVICES

- RSS Feeds
- Corporate Access
- Reprints
- Career Center

MY ACCOUNT

- Login
- [Update Login Information](#)
- [Update Account Information](#)
- Renew Subscription

CUSTOMER SERVICE

- About PAM
- Contact Us
- Help/FAQ's

ADVERTISING

- Advertising Opportunities

SUBSCRIBE

- Subscribe
- Free Trial

The Alliance Readies First SFO Forum

- 08/21/2008 [To comment on this article click here \(0\)](#)



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.

YOU ARE ENTITLED TO DISPLAY AND SEARCH THE CONTENT OF THIS SERVICE AT THE TERMINAL ACCESSING OUR SITE, AND TO DOWNLOAD ARTICLES, SOLELY FOR YOUR OWN PERSONAL USAGE. NO PART OF THIS SERVICE OR CONTENT CONTAINED HEREIN MAY BE OTHERWISE RETRANSMITTED, REDISTRIBUTED, COPIED, STORED, DOWNLOADED, ABSTRACTED, DISSEMINATED, CIRCULATED OR INCLUDED AS PART OF ANY OTHER PRODUCT OR SERVICE.

Welcome

- [Update Account Info](#)
- [Renew Subscription](#)
- [Logout](#)

RELATED ARTICLES

- * Chicago-based law firm **Handler, Thayer & Duggan** has tapped ...
- Mergers & Acquisitions To Heat Up Among MFOs
- Mergers & Acquisitions To Heat Up Among MFOs
- Advisory/Multi-Family Office Of The Year
- MFO Mergers Heat Up, More Variations Expected

Institutional Investor Events & operations management present the . . .

Financial Technology Congress 2008

September 22-23, 2008
Four Seasons Hotel Boston