OCTOBER 25th – 26th, 2017
Birmingham, Michigan
We are pleased to invite you and a guest(s) to attend our Family Financial Summit, which will take place October 25th – 26th, 2017 in Birmingham, Michigan. Our event will begin with an opening dinner on October 25th at The Townsend Hotel, followed by a day of networking and educational sessions on October 26th at The Community House.

Within your families and businesses, we know that wealth brings tremendous opportunity for effective stewardship — preserving wealth, doing the greatest good with it, and preparing the next generation to carry it forward. The theme, “The Stewardship of Wealth: Learn, Lead, Legacy” was chosen to encompass a wide range of thought-provoking topics surrounding cybersecurity, wise investing, philanthropy, family dynamics, and establishing a well-run investment committee.

Our program will feature Jerry Linenger, astronaut and American hero, who will discuss embracing challenges and change. We are also very pleased to have Rod Wood, President of the Detroit Lions, and Jonathan Reinsdorf, entrepreneur and family member of the owners of the Chicago White Sox and Chicago Bulls, as well as many other industry experts join us to share their expertise and insight. While listening to, learning from, and engaging with our speakers, we hope you, in turn, will share your knowledge and experiences with one another, in a comfortable, confidential setting.

Our team is very excited for the opportunity to host you at our summit, and we hope you can join us for this valuable and unique experience!

Bob Palmer  
Industry Leader  
Plante Moran Wealth Management

John Lesser  
President  
Plante Moran Financial Advisors
Wednesday, October 25th
The Townsend Hotel, Birmingham, MI

5:30 – 6:00 p.m.  
Family welcome reception

6:00 – 6:45 p.m.  
Dinner and conversations

6:45 – 7:30 p.m.  
Making a Positive Impact Both On and Off the Field

ROD WOOD  
PRESIDENT | DETROIT LIONS

Prior to his appointment as the Detroit Lions’ team president, Rod worked with the Ford family in his role as president and CEO of Ford Estates. During his talk, he will cover fascinating similarities between his wealth management experiences and running a football team. Themes will include the need for short-term and long-term objectives, sticking to a plan, and making needed adjustments along the way. Rod’s interesting and interactive presentation will highlight the advantages of remaining patient, avoiding emotional swings, and being careful about making snap decisions.

Thursday, October 26th
The Community House, Birmingham, MI

7:30 – 8:15 a.m.  
Breakfast buffet

8:15 – 8:30 a.m.  
Welcome from Bob Palmer & John Lesser

8:30 – 9:30 a.m.  
Cybersecurity: A Proactive Approach

RAJ PATEL  
PARTNER & CYBERSECURITY EXPERT | PLANTE MORAN

Are you protecting your family, assets, and business from the rising cybersecurity threats? We will look at potential risks and best practices that should be top of mind for executives and affluent families.
<table>
<thead>
<tr>
<th>Time</th>
<th>Session/Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:30 – 9:45 a.m.</td>
<td>Break</td>
</tr>
<tr>
<td>9:45 – 10:30 a.m.</td>
<td>Breakout sessions&lt;br&gt;(Choose one of the four sessions)</td>
</tr>
<tr>
<td>10:30 – 10:45 a.m.</td>
<td>Break</td>
</tr>
<tr>
<td>10:45 – 11:30 a.m.</td>
<td>Breakout sessions&lt;br&gt;(Choose one of the four sessions)</td>
</tr>
<tr>
<td>11:30 – 11:45 a.m.</td>
<td>Break</td>
</tr>
<tr>
<td>11:45 a.m. – 1:15 p.m.</td>
<td><strong>Lunch</strong>&lt;br&gt;<strong>Living, Leading, and Giving Back</strong></td>
</tr>
<tr>
<td></td>
<td>JONATHAN REINSDORF&lt;br&gt;PRESIDENT</td>
</tr>
<tr>
<td></td>
<td>Jonathan will share some of his rich life experiences, spanning from working in a family real estate business to managing professional athletic teams, as well as making a name for himself as a successful technology entrepreneur.</td>
</tr>
<tr>
<td>1:15 – 2:15 p.m.</td>
<td><strong>Embracing Challenges &amp; Change:</strong>&lt;br&gt;<strong>My 132 Days Off the Planet</strong></td>
</tr>
<tr>
<td></td>
<td>JERRY LINENGER&lt;br&gt;ASTRONAUT AND AMERICAN HERO</td>
</tr>
<tr>
<td></td>
<td>A U.S. astronaut aboard the infamous Mir Space Station, Mr. Linenger survived one of the most traumatic and dangerous space missions in history. The five-month ordeal included a near-collision with a supply ship, tumble through space as oxygen ran low, and a fight with the worst fire ever to occur in space. Mr. Linenger will recount these events, challenging us to likewise embrace change, rise to the occasion, and work together as a team to overcome adversity.</td>
</tr>
<tr>
<td>2:15 – 2:30 p.m.</td>
<td>Closing remarks</td>
</tr>
</tbody>
</table>
A

Opportunities in Philanthropy
KATE MCADAMS | Managing Director, Arabella Philanthropy Advisors
ELLIE FREY | Third-Generation Trustee and Vice Chair, Frey Foundation; Director, Family Business Alliance; Founder, Successful Generations LLC
JONAH WITTKAMPER | Founder, Nexus Global Youth Summit
JULIA VAN DOMELEN | Philanthropist, Bill and Julia Van Domelen Foundation
Moderator: Dawn Jinsky, CFP®, CPA | Partner, Plante Moran

No matter their resources, a philanthropist seeks to maximize their impact. Our panel of experts will explore trends in philanthropy, how givers measure success, the desire for experiential giving, and how families make giving decisions. We will also discuss the vast differences between historic, current, and future philanthropy norms and expectations.

B

Investing in Today’s Global Economy
RICHARD SCHMIDT, CFA | Partner, Harding Loevner
JONATHAN LEMCO, PH.D | Senior Investment Strategist, Vanguard
DAVID VICK, CFA | Managing Director, TCW/MetWest
Moderator: Jim Baird, CPA, CFP®, CIMA® | CIO & Partner, Plante Moran Financial Advisors

Join us as we hear from leading experts as they share their thoughts on the global economy and wise investing in the ever-changing landscape. This interactive panel discussion will be sure to educate and provide fascinating insights.

C

To Reveal or to Conceal? The Complexities of Communication and Family Dynamics
DRS. CAROLYN FRIEND & JAMES WEINER | Wealth Inheritors, Family Business Owners, Founders & Wealth Whisperers™, Inheriting Wisdom

In family, transparency — the concern about how much to reveal, to whom, and when — is a complex issue. Most often, protecting the business, investments, and wealth that fuel the financial and philanthropic interests of the family is the primary consideration.

D

Characteristics of a Well-Run Investment Committee
MARK DIXON, CPA, CFP®, CIMA® | Partner, Plante Moran Institutional Investment Consulting Practice Leader
SUSAN SHOEMAKER, CFP®, AIFA | Partner, Plante Moran Retirement Plan Investment Consulting Practice Leader

Whether serving on the board of a nonprofit or a company retirement planning committee, the formation of a creditable investment committee is vital to the health of the organization. In this session, we will explore the defining characteristics of a well-run committee including proper guidance, fiduciary responsibilities, and best-in-class ideas.
General Information

Plante Moran Wealth Management
Family Financial Summit
The Townsend Hotel; The Community House
October 25th – 26th, 2017

Venue information
The Townsend Hotel and The Community House are located in downtown Birmingham.

<table>
<thead>
<tr>
<th>The Townsend Hotel</th>
<th>The Community House</th>
</tr>
</thead>
<tbody>
<tr>
<td>100 Townsend St.</td>
<td>380 S. Bates St.</td>
</tr>
<tr>
<td>Birmingham, MI 48009</td>
<td>Birmingham, MI 48009</td>
</tr>
</tbody>
</table>

Registration information
Participation in the Family Financial Summit is by invitation only. To confirm your attendance for the event, please return the registration form by October 20th, 2017.

VIA EMAIL
familyfinancialsummit@plantemoran.com

VIA MAIL
Plante Moran
27400 Northwestern Highway
Southfield, MI 48034
Attn: Chrissy Wafers

OR REGISTER ONLINE
at www.plantemoran.com/financialsummit

You will receive a registration confirmation via email. Please contact Cara Mossington at (248) 223-3943 or Chrissy Wafers at (248) 223-3952 with any registration changes or questions.

Hotel information
The Townsend Hotel is located in downtown Birmingham at:
100 Townsend St., Birmingham, MI 48009.

For room reservations, please call the hotel directly at (248) 642-7900 or by emailing reservations@townsendhotel.com, and mention that you are with the Plante Moran Family Financial Summit to receive the special room rate. This rate is available on a first-come, first-serve basis. For more information, please visit www.townsendhotel.com.

Conference attire information
Business or business-casual attire is appropriate during the program and meetings on Thursday. For the Wednesday dinner, sport coats and ties for the gentlemen, and dresses or pantsuits for the ladies are suggested.
**Participation in the Family Financial Summit is by invitation only. To confirm your attendance for the event, please return the registration form by October 20th, 2017, via email to familyfinancialsummit@plantemoran.com; via mail to Plante Moran, 27400 Northwestern Highway, Southfield, MI 48034, Attn: Chrissy Wafers; or by registering online at www.plantemoran.com/financialsummit.**

You will receive a registration confirmation via email. Please contact Cara Mossington at (248) 223-3943 or Chrissy Wafers at (248) 223-3952 with any registration changes or questions.