2024 Family Forum

A half day of educational sessions and financial insights tailored for every generation

Friday, July 26




You are invited

Please join us for our 17th Annual Family Forum, a half day of educational sessions and financial insights tailored for every generation.

Trillium Partners is excited to be back at Capital City Country Club for this year's event and have crafted a lineup of topics that address the uncertainty in what lies ahead for the remainder of the year and beyond, including the implications of the outcome of the upcoming presidential election.

Hosted by
Trillium Partners
UBS Wealth Management
UBS Financial Services Inc.

Friday, July 26
Capital City Country Club
53 West Brookhaven Drive Northeast
Atlanta, GA 30319

Schedule

8:00 – 8:45 a.m.	**Registration and breakfast**
8:45 – 9:00 a.m.	**UBS opening remarks**
9:00 – 9:50 a.m.	**Morning keynote:** Mid-Year Election Outlook
10:00 a.m. – noon	**Educational breakout sessions**
Noon – 12:30 p.m.	**Lunch**
12:30 – 1:30 p.m.	**Afternoon keynote:** Generational Wealth Conversations

RSVP
Register on our website: *advisors.ubs.com/trillium/events*
Register via e-mail: *trilliumpartners@ubs.com*

Education schedule

8:00 – 8:45 a.m.	**Registration and breakfast**
8:45 – 9:00 a.m.	**UBS opening remarks**
9:00 – 9:50 a.m.	**Morning keynote: Mid-Year Election Outlook** Jennifer Flitton, Head of US Government Affairs, Invesco Adam Scheiner, CFA®, Senior Portfolio Manager Equities, UBS Global Asset Management Dominic Schagar, Senior Investment Equity Specialist, UBS Global Asset Management
10:00 – 10:50 a.m. Breakout sessions	**Session A** **Market Update – Second Half 2024 and Beyond** Shakeel Barkat, CIMA®, Director of Fixed Income Markets, Capital Group Adam Scheiner, CFA®, Senior Portfolio Manager Equities, UBS Global Asset Management Dominic Schagar, Senior Investment Equity Specialist, UBS Global Asset Management **Session B** **Perspectives on Artificial Intelligence** Chris Darragh, Vice President Americas, Retail Client Business, Goldman Sachs
11:00 – 11:50 a.m. Breakout sessions	**Session A** **The State of Digital Assets** Kathy Kriskey, Senior Commodity Strategist, Invesco David Knowlton, CFA®, Head of Product Galaxy Asset Management Ric Golubov, Vice President, Digital Assets Business Development, Franklin Templeton **Session B** **The Psychology of Investing** Michael Graci, AIF, Director, Business Development Consultant, BlackRock
Noon – 12:30 p.m.	**Lunch**
12:30 – 1:30 p.m.	**Afternoon keynote: Generational Wealth Conversations** Doug Horton, CRPC®, Vice President, Business Development Consultant, MFS Investment Management
1:30 – 1:45 p.m.	**UBS closing remarks**

Laura W. Wellon, CEPA, BFA, PMP
Senior Vice President–Wealth Management
Senior Portfolio Manager

Harris M. Gignilliat, CIMA®, CRPS™, C(k)P
Senior Vice President–Wealth Management
Senior Institutional Consultant

Justin Patteson, CFP®, CPWA®
Senior Wealth Strategy Associate

Elizabeth C. Johnson, CFP®, CFS®, CRPS™
Senior Wealth Strategy Associate

Cory Sellers, CFP®, CEPA, CRPS™
Senior Wealth Strategy Associate

Julie Warren Holton
Team Business Manager

Laura W. Wellon named to

– *Barron's* Top 100 Women Advisors, 2015. The *Barron's* rating is awarded annually in June and is based on information from the Q1 of the award year.
– *Forbes* America's Top Women Wealth Advisors, 2017 – 2021. The *Forbes* rating is compiled by SHOOK Research and awarded annually in February based on information from a 12-month period ending September of the prior year.
– *Forbes* Best-In-State Wealth Advisors, 2018 – 2024. The *Forbes* rating is compiled by SHOOK Research and awarded annually in April based on information from a 12-month period ending June of the prior year.
– *Forbes* Best-In-State Wealth Management Teams, 2024. The *Forbes* rating is compiled by SHOOK Research and awarded annually in January, based on information from a 12-month period ending March of the prior year.
– *Forbes* Top Women Wealth Advisors Best-In-State, 2022 – 2024. The *Forbes* rating is compiled by SHOOK Research and awarded annually in February based on information from a 12-month period ending September of the prior year.
– NAPA Top DC Advisor Teams, 2021. The NAPA rating is awarded annually in March based on information from December of the prior year.
– *PLANADVISER* Top Retirement Plan Advisers, 2021. The *PLANADVISOR* rating is awarded in Q1 based on information from Q1 of the award year.
– *Working Mother* Magazine/SHOOK Top Wealth Advisor Moms, 2017 – 2021. The *Working Mother* Magazine/SHOOK rating is compiled by SHOOK Research and awarded annually in October based on information from a 12-month period ending in March of the award year.

Eligibility is based on quantitative factors and is not necessarily related to the quality of the investment advice.

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For more information on third-party rating methodologies, please visit **ubs.com/us/en/designation-disclosures.**

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