

# CXS

## { Convergent 10 Symposium }

April 20 - 21, 2010

**Dinner on April 20<sup>th</sup> at 6:00 PM**

**Featuring Guest Speaker**

*Patty Stonesifer (Senior Advisor to Bill & Melinda Gates Foundation Trustees and  
Chair of the Board of Regents for the Smithsonian Institution)*

**Event on April 21<sup>st</sup> begins at 8:00 AM**

*Arrival/Continental Breakfast*

**8:15 AM – 8:30 AM**

**Welcome and Introductions**

*Steve Lockshin (CEO, Convergent Wealth Advisors)*

**8:30 AM – 9:45 AM**

**Macro Economic Outlook**

*Moderated by Willem Kooyker (Chairman, Blenheim Capital Management)*

**9:45 AM – 11:00 AM**

**Constitutional Relevance in the Age of Obama**

*Moderated by Robert Levy (Chairman, The Cato Institute)*

**11:00 AM – 11:15 AM**

*Break*

**11:15 AM – 12:30 PM**

**Estate and Finance Planning in Today's Turbulent Environment**

*Moderated by Jonathan Blattmachr*

**\*\* Lunch Served \*\***

**1:00 PM – 2:15 PM**

**Economic and Market Update**

*Moderated by Liz Ann Sonders (Chief Investment Strategist, Charles Schwab & Co.)*

**2:15 PM – 2:30 PM**

*Break*

**2:30 PM – 3:45 PM**

**The Global Market Landscape and Investment Opportunities**

*Moderated by Daniel Och (Chairman and CEO, Och-Ziff Capital Management)*

**3:45 PM – 5:00 PM**

**Real Estate Investments in Today's Environment**

*Moderated by Dr. Peter Linneman (Principal, Linneman Associates and Albert Sussman Professor of Real  
Estate, Finance and Public Policy at The Wharton School of Business)*

## 2010 Convergent 10 Symposium Speakers:

### **Jonathan Blattmachr :**

Jonathan Blattmachr is a member of the Alaska, California and New York Bars, and retired partner from the law firm of Milbank, Tweed, Hadley & McCloy LLP. He has served as a lecturer-in-law of the Columbia University School of Law and an Adjunct Professor of Law at New York University Law School. Mr. Blattmachr is a former Chairperson of the Trusts & Estates Law Section of the New York State Bar Association and of other committees of the New York State Bar Association and the American Bar Association.

### **Willem Kooyker :** Chairman, Blenheim Capital Management

Willem Kooyker is the founder and the majority owner of Blenheim Capital Management and has been a prominent participant in the international commodities business for over 40 years. Mr. Kooyker started his international commodities trading career with Internatio-Muller in Rotterdam in 1964. He is a former member of the Board of Directors of the NY Coffee, Sugar and Cocoa Exchange, a former president of the NY Cocoa Clearing Association, and a former member of the NY Mercantile Exchange.

### **Robert Levy :** Chairman, The Cato Institute

Robert Levy is Chairman of the Cato Institute's board of directors. He joined Cato as senior fellow in constitutional studies in 1997 after 25 years in business. Mr. Levy also sits on boards of the Institute for Justice, the Federalist Society, and the George Mason University School of Law. He founded CDA Investment Technologies, a major provider of financial information and software, and was its CEO until 1991.

### **Dr. Peter Linneman :** Principal of Linneman Associates and Albert Sussman Professor of Real Estate, Finance and Public Policy at the Wharton School of Business

Dr. Peter Linneman is the principal of Linneman Associates and also serves as the Albert Sussman Professor of Real Estate, Finance, and Public Policy at the Wharton School of Business, the University of Pennsylvania. A member of Wharton's faculty since 1979, he served as the founding chairman of Wharton's Real Estate Department, and was the Director of Wharton's Zell-Lurie Real Estate Center for 13 years.

### **Daniel Och :** Chairman and CEO, Och-Ziff Capital Management

Daniel Och is the Chief Executive Officer, an Executive Managing Director, and the founder of the OZ organization. He is also a member of the Board of Directors of the Master Fund, Chairman of the Partner Management Committee, Chief Executive and a Director of Och-Ziff Europe, Chairman of the Board of Directors of Och-Ziff Hong Kong, Supervisor of Och-Ziff Beijing and a Director of Och-Ziff India.

### **Liz Ann Sonders :** Chief Investment Strategist, Charles Schwab & Co.

Liz Ann is Chief Investment Strategist of Charles Schwab & Co. She has a broad range of investment strategy responsibilities reaching from market and economic analysis to investor education. Ms. Sonders chairs Schwab's Investment Strategy Council, which provides strategic asset allocation guidance and tactical sector recommendations for the firm's investor base.

### **Patty Stonesifer :** Senior Advisor to Bill & Melinda Gates Foundation Trustees and Chair of the Board of Regents for the Smithsonian Institution

Patty Stonesifer is a senior advisor to the Bill and Melinda Gates Foundation's trustees, Bill and Melinda Gates and Warren Buffett. As CEO of the foundation from its inception in 1997 until August 2008, Stonesifer led the foundation's mission to promote equity for all people around the world, setting strategic priorities, monitoring results, and facilitating relationships with key partners. She also serves as chair of the Board of Regents for the Smithsonian Institution.