| | BONUS DISTRIBUTION | SPACE | MATERIALS | MAIL DATE |
|---|---|---|---|---|
| **JANUARY/FEBRUARY** | | | | |
| • Health Care for the Affluent<br>• Family Mediation in Estate Planning | • **Inside ETFs Conference**<br>• 2012 Heckerling Annual Conference<br>• AM&AA Winter Conference<br>• IMCA NY Consultants<br>• TD Ameritrade Institutional | 11/30/11 | 12/5/11 | 1/2/12 |
| **MARCH/APRIL** | | | | |
| • Heckerling Conference Followup<br>• Personal Security<br>• Wealth Management for Celebrities | • **Innovative Real Estate Strategies Conference**<br>• AALU Annual Meeting<br>• ABA Wealth Management & Trust Conference | 2/7/12 | 2/14/12 | 3/8/12 |
| **MAY/JUNE** | | | | |
| • Life Insurance Strategies<br>• MFO Staff Development | • **Financial Advisor Retirement Symposium**<br>• **Family Office Workshop**<br>• IMCA National Conference<br>• IIR Family Office Forum<br>• Pershing INSITE<br>• Morningstar | 4/6/12 | 4/13/12 | 5/9/12 |
| **JULY/AUGUST** | | | | |
| • **Multifamily Office Update and Directory of MFO/Wealth Advisory Services**<br>• Lifestyle Management<br>• Children and Wealth | • **Innovative Alternative Strategies Conference**<br>• ABA Forum for Fiduciaries | 6/7/12 | 6/14/12 | 7/9/12 |
| **SEPTEMBER/OCTOBER** | | | | |
| • **Family Office/Wealth Advisory Technology Guide and Directory of Providers**<br>• Trust and Estate Planning<br>• Alternative Investments | • **The Fiduciary Gatekeeper Research Manager Summit**<br>• **Impact Investing Workshop**<br>• FRA Family Office Forum<br>• IMCA Advanced Wealth Conference | 8/7/12 | 8/14/12 | 9/7/12 |
| **NOVEMBER/DECEMBER** | | | | |
| • Family Foundations<br>• Technology | • **Family Office Workshop**<br>• Inside Commodities Conference<br>• Schwab IMPACT | 10/8/12 | 10/15/12 | 11/8/12 |