Family Business Center hosts 10th Wealth Management Seminar

April 20, 2011

The 10th annual Tulane Family Business Center Wealth Management Seminar will be held on Wednesday, April 27, from 1 - 6 p.m., at the Intercontinental Hotel in New Orleans. The event is free and open to the public, but reservations are required.

The seminar offers information on asset management and strategies for perpetuating family business growth. Seasoned professionals and novices alike will benefit from the expert financial advice offered by participating sponsors including J. P. Morgan Chase, Jones Walker, LaPorte Sehrt Romig Hand and the Greater New Orleans Foundation.



Buddy Roemer



Robert A. Weiss



St. Denis J. Villere & Co.

This year’s keynote speakers are Buddy Roemer, president of Business First Bank and former governor of Louisiana, and Robert A. Weiss, managing director with J. P. Morgan’s Advice Lab. The event will also feature the presentation of the 2011 Outstanding Family Enterprise Award to St. Denis J. Villere & Co.

The program begins at 1 p.m. with registration at 12:30 p.m., and CPE credits will be offered.

PROGRAM SCHEDULE

All presentations will take place in the Intercontinental Hotel’s LaSalle Ballroom - 1st Floor.

1:00 - 1:15 p.m.

Introduction by John Elstrott, clinical professor of entrepreneurship at Tulane's A. B. Freeman School of Business and director of the Tulane Family Business Center

1:15 - 2 p.m.

"Uncovering Opportunities: Pre-transaction Planning Using Wealth Allocation," presented by Robert A. Weiss, J. P. Morgan Chase Advise Lab

2:15 - 3 p.m.

"Doing Well By Doing Good: Corporate Giving and the Bottom Line," presented by Albert Reusga, Greater New Orleans Foundation

3 - 4 p.m.

"Financial Goals and the Value of Your Business," presented by Michele Avery, LaPorte Sehrt Romig Hand

"Estate and Gift Taxes in 2011 and Beyond: Something Old and Something New," presented by Trevor Wilson, Jones Walker

4:15 - 4:45 p.m.

"Looking at Our Economic Future and Key Legislative Issues for Businesses," presented by Buddy Roemer, Business First Bank

4:45 p.m.

Presentation of 2011 Outstanding Family Enterprise Award to St. Denis J. Villere and Co.

5 p.m.

Cocktail Reception

For more information about the seminar or to RSVP, please contact Rosalind Butler at familybiz@tulane.edu or 504-862-8482.