

Professional Advisory Network Luncheon Registration December 5, 2024

Professional Advisory Network Quarterly Luncheon December 5, 2024

LOCATION:

**McDermott Will & Emery
2049 Century Park East, Ste 3200**

PROGRAM:

11:30 am: Sign-In/Networking
11:50 am - Seating and Lunch
12:20 pm - Opening Remarks
1:30 pm - Adjournment

REGISTRATION:

**MPTF PAN Members: Free
Guests: \$85**

CPE

This PAN presentation has been approved for one hour of CPE and

PARKING:

Valet and self parking is included.

MPTF Luncheon Sponsor



Contact Kathy Davis to become a PAN Platinum Corporate Member

**Benefits: Speaking opportunity during Luncheon Welcome, corporate logo on PAN marketing material, signage at luncheon venue, and more.
Kathy.Davis@mptf.com**

“The Art of Collecting: *What to Know When Protecting Celebrity Clients in the Art, Luxury, and Collectibles Market*”

Please join us on Thursday, December 5th for MPTF’s 4th Q Professional Advisory Network’s (PAN) luncheon presentation, “The Art of Collecting: *What to Know When Protecting Celebrity Clients in the Art, Luxury, and Collectibles Market*.” Our panelists include **Anita Heriot**, President of the Americas, Fine Art Group and **Babette Campbell**, Partner, Armanino, and Shirley Gordon, Relation Insurance Services.

Their presentation will focus on:

- The Importance of Independent Due Diligence for celebrity client... What to know before you Buy
- Why Managing Art, Luxury Assets, and Collectibles is a team sport
- How to Insure and Protect Art, Luxury Assets, and Collectibles for Celebrity Clients
- How to Create Long Term Tax Strategies for Art, Luxury Assets, and Collectibles for Celebrity Clients

Speaker’s Bio



Anita Heriot is President of The Fine Art Group, The Americas. Prior to founding Pall Mall Art Advisors in 2012 which was acquired by The Fine Art Group, Anita worked in the auction world as a Director of Appraisals and a specialist. A nationally sought-after speaker, Anita has lectured at the Barron’s 100 and 500 Summits; to over 30 chapters of Tiger 21, a high-net-worth learning network; to the investment forum of YPO, the premier leadership organization of chief executives in the world, to bankers, attorneys, insurance specialists and accountants throughout the United States. She has appeared on several TV shows and is frequently interviewed by the media for her insights into the art world.



Babette Campbell, Partner, Armanino. Babette works with ultra-high-net-worth individuals and their families on all aspects of their lives, including asset acquisition, reporting and budgeting, investment and estate and tax planning. Babette works in collaboration with a network of outside advisors, including attorneys, insurance and investment advisors and other family wealth specialists to serve her business management/family office clients.



Shirley A. Gordon, CRM, is the National Practice Leader, HNW & Family Office Risk Management at Relation Insurance Services, Inc. Shirley leads the National Personal and Family Office Practice for Relation Companies, ensuring clients and select partners receive timely and valuable risk management advice and solutions. A certified risk manager (CRM), Shirley joined Relation with 20 years insurance experience, previously with Wells Fargo Private Risk Management, and Marsh Private Client Services, among other companies.

MPTF PAN Quarterly Luncheon Registration Form

Guests: \$85 - Includes Lunch and Parking

Guests must call 72 hours in advance for a full cancellation refund.

Questions? Please contact Kathy Davis at 818-876-1924.

Please RSVP by December 2nd

Member Registration Information

NAME: _____

Company: _____

Day Phone: _____ E-Mail: _____

Guest Registration Information

NAME: _____

Occupation: _____ Title: _____

Company: _____

Address: _____

City/ST: _____ ZIP: _____

Day Phone: _____

Email: _____

Payment Information

Credit Card: _____ **(VISA, MC, AMEX & Discovery are accepted)**

Credit Card # _____

Exp Date: _____ Security #: _____ (3 digit # on back of most cards)

Signature: _____

Printed Name: _____

Credit Card Billing Address if Different from Business Address

Address: _____

City/ST: _____ ZIP: _____

Please return your registration form via one of the following:

FAX: 818-876-1940 or Email: kathy.davis@mptf.com or Call: Kathy Davis at 818-876-1924 with your information