



Private Client Summit

March 17 & 18, 2009
Hilton Minneapolis

Tuesday, March 17

4:00-5:00 **Consumer Mindset**—Ellen Glatstein, principal, Idea Greenhouse

Ellen recently completed a research project for a private company focusing on incoming college students' attitudes toward dorm living, roommates, acclimating to college, and making connections and friends—both from student and parent perspectives. Ellen will set the stage for the focus groups to follow by painting a portrait of the current consumer mindset of echo boomers and their parents.

5:30-6:45 **Focus Group One:** academically-capable students from affluent families who have been admitted to a selective private college *and* a flagship university *and* are undecided about enrollment. Moderated by Kevin Menk, managing partner, Strategic Resource Partners

6:45-7:30 **Chris Farrell**, economics editor for Marketplace Money and Business Week

7:30-9:30 **Focus Group Two:** Parents of students such as those described above

Wednesday, March 18 – 7:00-4:00pm in Salon B, American Ballroom

8:30-9:00 **Debrief Focus Groups and Facilitated Discussions** – Kevin Menk

9:00-10:45 **The Economy: Investment Climate, Capital, and Credit Markets
Resource Panel:**

Sandy Baum, senior policy analyst, College Board

Doug Box, CFP, ChFC; chief operating officer, Box Financial Advisors

Jamie Wolfe, chief financial officer, Total Higher Education/Northstar

11:00-12:00 **Federal and State Policy**

Resource Panel:

David Laird, president, Minnesota Private College Council

Hans Giesecke, president, Independent Colleges of Indiana

- 1:00-2:00** **The Academic Program and Student Experience: Value, Cost, and Delivery**
Richard Cook, president emeritus of Allegheny College and former dean of Kalamazoo College
- 2:15-3:00** **Marketing, Communications, Brand: Evolution and Utility**
John Lawlor, president, The Lawlor Group
- 3:00-4:00** **Synthesis: Planning for Product, Price, and Promotion**
Jon McGee, vice president of planning and research, St. John's University/College of St. Benedict