

# FOX Sponsorship and Exhibitor Guide

2014

## IMPACT



### **FOX Wealth Advisor Forum**

Chicago, IL - April 23-25, 2014

## ACCESS



### **FOX Financial Executives Forum**

Chicago, IL - July 22-23, 2014

### **FOX Private Family Trust Company Symposium**

Chicago, IL - September 22-23, 2014

## CONTINUITY



### **FOX Fall Forum**

Chicago, IL - October 28-30, 2014

# Make an impact in the family office market in 2014

Family Office Exchange is the world's most advanced peer-to-peer network for ultra-wealthy families and the advisors that serve them. At FOX, we understand the challenge of reaching this exclusive market and offer the opportunity for your firm to make a significant impact throughout the year.

Participation at FOX events goes beyond traditional opportunities. We work with you to understand your goals and provide insights and guidance to ensure your firm has unique impact, access and continuity of positioning through the year.

Four forums and a new symposium offer unique opportunities to interact with the largest, most qualified family office audience anywhere.

## There are two levels of engagement available:

- À la carte sponsorship or exhibiting
- The FOX partner program is for qualified firms, which include special benefits such as enhanced FOX Directory listings and development of an Exclusive Offer to showcase your firm's expertise. (Please inquire)

“I like the tight connections and bonds that add the true value to the FOX network of advisors and family offices. It is this network and exchange of quality ideas that is at the core of business ideas and development in our markets”

—FOX Member and Sponsor

## About FOX Members



On average, FOX family office members manage assets in excess of  
**\$500 million**

## FOX PARTNER PROGRAM STRATEGY



### IMPACT: FOX Event Sponsorship

Sponsors are collaborators that bring expertise that enriches the program experience for attendees. As a sponsor, you are prominently positioned, in multiple media, as an underwriter of a leading industry event. [See program offerings on pages 2-5.](#)



### ACCESS: FOX Directory Listing

The FOX Advisor Directory is known as a go-to place when members need a resource quickly. Sponsors, who are FOX members, can receive enhanced four screen profiles in the directory which delivers over 63,000 page views annually. [See page 6. Available only to select firms.](#)



### CONTINUITY: FOX Exclusive Offer

Work with the FOX team to develop a unique offer for Family Office members that illustrates your firm at its best and is available on the family office members private website. [See page 6. Available only to select firms.](#)

Please inquire.



## IMPACT: FOX Forum Sponsorship

Forums offer sponsors the opportunity to collaborate with FOX to develop a role that showcases your expertise while engaging your firm as a central part of the event community. Ideal sponsors and exhibitors include firms that provide insurance, software and reporting, investment consulting, money management, security, concierge, and private travel.



### FOX Wealth Advisor Forum

April 23 – 25, 2014  
The Fairmont • Chicago, IL

#### Attendee Profile

125-150 total attendees comprised of MFOs, banks, trust companies, law firms, accounting firms, family business consultants, and investment consultants who serve ultra wealthy families.

#### Event Profile

The FOX Wealth Advisor Forum brings together advisors to learn about trends and best practices in serving the ultra-wealth market.

#### Welcome Reception Sponsor

April 23 - \$5,000

#### Panel Sponsor

\$10,000

#### Luncheon Sponsor

\$7,500

#### Dinner Event Sponsor

April 24 - \$7,500

#### Exhibitor

\$6,500 (max. six sponsors)

Michael Brink  
Memorial  
Golf Outing  
Sponsorship



#### \$4,500 Includes

- Golf score card and golf cart
- Boxed lunch
- Hole in one
- Closest to the pin



### FOX Financial Executives Forum

July 22 – 23, 2014  
Chicago, IL

#### Attendee Profile

80 family office financial executives and 30+ MFO financial executives.

#### Event Profile

The Financial Executives Forum content is ideal for single family offices and MFO financial executives seeking an update on tax and estate planning, technology, and risk mitigation.

#### Welcome Reception

The welcome reception sets the pace for the Financial Executive Forum by providing an initial networking opportunity to reconnect with industry colleagues and meet new contacts.

#### Technology Showcase

\$8,000 - Demonstrate your software solutions in two 15 minute presentations.

#### Exhibitor

\$6,500



## IMPACT: FOX Private Family Trust Company Symposium and Network

As a sponsor, you will collaborate with FOX in identifying a topic where your firm can participate in the symposium and interact with symposium attendees. Ideal sponsors and exhibitors include firms providing essential services to private trust companies and family offices such as accounting, tax, insurance, software and reporting, executive search, and legal.



### FOX Private Family Trust Company Symposium

September 22 – 23, 2014  
Chicago, IL

#### Attendee Profile

50-60 Private Family Trust Company executives who institutionalize their family governance through a Private Trust Company.

#### Event Profile

The Private Family Trust Company Symposium provides 1.5 days of in-depth information relevant to the needs of executives managing or interested in learning about the private trust company structure.

#### Event Sponsorship Opportunity

\$15,000

### Private Family Trust Company Network



Be part of the launch and conversation of the Private Family Trust Company Network as FOX brings together PFTC executives, advisors, regulators and industry experts to address the needs of the PFTC throughout the year. Position your firm as the network's advocate while demonstrating your firm's expertise in a variety of formats. Fee: \$25,000

“You cannot put a price tag on these relationships which represent an opportunity to collaborate with the very best advisors from various industries, ultimately adding value to my client offering and leveraging new business opportunities.”

—Sponsor

### About FOX Members



FOX educates over **250** Multi-family Offices and wealth advisory firms about how to best serve wealth owners.

### About FOX Members



**9** out of **10** members operate established family offices more than 5 years old.





## IMPACT: FOX Fall Forum Sponsorship

This year marks the 25th Anniversary of Family Office Exchange. For a quarter century, FOX has worked closely with families, advisors and industry leaders to define and raise awareness around best practices in wealth management. The Fall Forum will be an industry hallmark as FOX builds on previous years to convene a prestigious group of families and industry leaders to commemorate accomplishments and look ahead. The anniversary celebration represents a unique branding and recognition opportunity for your firm.



### FOX Fall Forum

October 28 – 30, 2014  
The Palmer House • Chicago, IL

#### Attendee Profile

350 total attendees of which 250 are family members, family office executives and 100 MFO executives and senior representatives from our wealth advisor community.

#### Event Profile

The FOX Fall Forum represents FOX's premier member event as it brings together family office executives, family members, and leading advisors serving the ultra wealthy community. The content features topics that are critical to the success and continuity of global families. The content provides insights and solutions to families and advisors alike. There is opportunity to network and connect across the entire forum.

#### Forum Track Sponsorship

October 27-28 – \$12,000

Track sponsorship provides your firm the opportunity to call out your expertise and brand in a specific concentration. An exhibitor table and one attendee at the All-Member dinner is included.

#### Private Family and Thought Leaders Council Dinner Sponsorship at the Chicago Art Institute

October 28 (Please inquire)

The Chicago Art Institute's Modern Wing will be the setting for this special evening where 150 Family Office and Thought Leader Council members come together to network and reflect on the progress made by family's over the past 25 years. FOX will work with you to creatively integrate your firm's brand and message into the evening's arrangements.

#### All Member Dinner Sponsorship at The Field Museum

October 29 (Please inquire)

The world renowned Chicago Field Museum is the site of the FOX 25th Anniversary celebration. The dinner is center stage in the Stanley Field Hall where guests are surrounded by the stately ambiance of the museum. Our guests will include family members, family office executives, industry leaders and pioneers gathering to commemorate the work that has been accomplished.

#### Concierge Café Sponsorship

October 29-30 – \$3,000 - \$6,000 (up to 6 companies)

Each participating service provider will have their own breakfast station, complete with branding and open to your firm's creative thinking for positioning.

#### Exhibit in the Collaboration Center

October 29-30 – \$9,500

The Collaboration Center integrates the expertise of exhibitors into the hub of the Forum's networking. It provides an experience that moves to an open engagement format with the Forum community.

#### Product Branding

A simple and straight forward opportunity for you to highlight your brand by having your logo on event items.

- Tote Bag – \$7,500 for 300
- Lanyard Sponsor– \$2,500 for 300



## ACCESS: FOX Advisor Directory

For select firms participating in the partner program, FOX makes available specialized positioning.



When FOX members have a need, they know they can rely on the FOX Advisor Directory to find expert advice and high quality referrals to trusted resources. Visitors to the FOX Advisor Directory are actively seeking a resource they can trust to help them address a real need in real time. The Directory helps to narrow the field and places your firm at the right place at the right time.

**As a sponsor, who is a FOX member or has been recommended by FOX members, your firm will receive an enhanced listing that includes:**

- Category Listing
- 4 screen profile capacity to provide video, articles and brochure content.



## CONTINUITY: FOX Exclusive Offer

The FOX Exclusive Offer program is dedicated to bringing FOX members unique services needed by family offices and wealthy families.



Your firm will work with FOX to develop an exclusive offering that will be made available to FOX family office members through the FOX private member website for one year. Firms providing private travel, insurance, biographical, concierge, human resources, technology, education, yacht or other specialized offerings for private families and family offices have the opportunity to demonstrate their services.

### Examples of a unique offering:

- One time assessments
- Complimentary risk reviews
- Special travel packages
- Group purchasing program
- Discounted services

We will work with you in guiding the development of an offer that will stand out and demonstrate your firm at its best. Limited opportunities available.

## READY TO GET STARTED?

**Start planning how a partner offering with FOX can work for you in 2014. Please contact:**

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