

# FOX Family Security Workshop™

July 18-19, 2018 | Swissotel | Chicago, IL



With serious new challenges to the safety and security of prominent families arising each day, this seems like a good time to come together to hear from experts about the steps we need to take to protect our clients. The **FOX Family Security Workshop**, July 18-19 in Chicago, will offer insights into the precautions for physical, personal, and cyber security.

Like every FOX workshop, the education not only comes from the experts who are speaking but also from your peers—the other attendees—who will be learning with you and sharing their questions and experiences.

To give you a flavor of what will be covered, here are a few of the session titles,

- *Hacking Demystified*
- *Protecting Your Family – The Importance of a Holistic Approach*
- *Be a Better Partner: Strategies for Securing Your Communication with Trusted Advisors*
- *Personal Security 101*
- *A Hacker's Guide to Physical Security*
- *Cybersecurity: Policies and Practices for Every Family*

Each session is described in further detail inside.

### WORKSHOP GUEST PRESENTERS



**Patrick Flanigan, CEH**

Manager  
Plante Moran



**Rob Gray**

Senior Director of Executive Security  
Programs and Operations  
Cox Enterprises, Inc.



**Stephen W. Locke, CISSP**

Director of Security Technology  
Northern Trust



**Cory T. Lunn, CISA**

IT Assurance Manager  
Wolf & Company, P.C.



**Joe Oleksak, CISSP, CRISC**

Partner Cybersecurity  
Plante Moran



**Eric Powell**

Chief Security Officer  
Bayshore Global Management LLC



**Colin Taggart, CISSP, CISA, CPA**

Senior Manager  
Plante Moran



**Brent White**

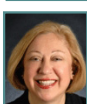
Sr. Security Consultant, Threat Services  
NTT Security

### FOX PRESENTERS



**Tony Gebely**

Chief Technology and Integration Officer  
Family Office Exchange



**Mariann Mihailidis**

Managing Director, Councils  
Family Office Exchange

### VENUE AND ACCOMMODATIONS



**Swissotel**

323 East Wacker Drive  
Chicago, IL 60601

**1.888.73.SWISS**

[www.swissotelchicago.com](http://www.swissotelchicago.com)

FOX has reserved a limited number of rooms at the Swissotel at a rate of \$249 per night plus applicable taxes. To obtain this discounted rate, please contact the Swissotel directly at **1.888.737.9477** and mention Family Office Exchange.

You may also book rooms online by visiting the FOX website at [www.familyoffice.com/FSW](http://www.familyoffice.com/FSW)

Workshop attendees are responsible for making their own accommodation arrangements. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is **Wednesday, June 20, 2018.**

### WEDNESDAY, JULY 18 AGENDA

**11:00 pm Registration Opens**

**12:00 pm Luncheon**

Choose between a general networking luncheon or joining the FOX Technology Operations and Data Security Network for luncheon discussions.

**1:00 pm Workshop Opening Remarks**

**Presenter: Tony Gebely, Chief Technology and Integration Officer, Family Office Exchange**

**1:10 pm Hacking Demystified**

**Presenters: Patrick Flanigan, CEH, Manager, Plante Moran**

**Joe Oleksak, CISSP, CRISC, Partner, Plante Moran**

**Colin Taggart, CISSP, CISA, CPA, Senior Manager, Plante Moran**

Organizations value and view security, risk and control differently. Some of these differences are related to risk and threat profiles impacting an organization based on factors such as industry, location, product/services, etc. Some differences are related to management's commitment to security, and others on experience with prior cyber-incidents. In this interactive session we will illustrate the importance of committing to security through live, real-world examples of hacking, and by discussing controls that we often find missing during our penetration testing, which if implemented, can help you to better secure your organization.

**2:45 pm Networking Break**

**3:10 pm Protecting Your Family – The Importance of a Holistic Approach**

**Presenters: Rob Gray, Senior Director of Executive Security Programs and Operations, Cox Enterprises, Inc.**

**Eric Powell, Chief Security Officer, Bayshore Global Management LLC**

As new social and geopolitical conflicts arise, threats to a family's security and well-being change. This landscape has materially shifted over the last few years and, as a result, families need to be prepared to address a variety of personal, physical, and cyber risks. In this session, family security directors from two single family offices will share strategies they use to protect the interests of the global, multigenerational families who employ them. They'll also lead the group in a risk assessment exercise and share the best practices and technologies used to mitigate risk.

**4:50 pm Day 1 Closing Remarks**

**5:00 pm Workshop Reception**

## THURSDAY, JULY 19 AGENDA

**7:45 am** Breakfast

**8:30 am** **Opening Remarks**

**Presenter: Tony Gebely**, Chief Technology and Integration Officer, Family Office Exchange

**8:40 am** **Be a Better Partner: Strategies for Securing Your Communication with Trusted Advisors**

**Presenter: Steve W. Locke, CISSP**, Director of Security Technology, Northern Trust

Financial institutions are critical partners of family offices. Security experts cite cyber threats as one of the top risks to financial markets. Financial institutions are continually challenged by the speed of technological change and the increasingly sophisticated nature of threats. Hear from a leading financial institution technology security expert about threats to the landscape, what they are doing to monitor and mitigate these risks and how a family office can implement security practices that will protect their financial assets and transactions.

**9:30 am** Networking Break

**10:00 am** **Peer Dialogues**

In this interactive discussion, participants will break into small groups to discuss their questions about personal, physical and cyber security.

**10:50 am** **A Hacker's Guide to Physical Security**

**Presenter: Brent White**, Sr. Security Consultant, Threat Services, NTT Security

Join Brent White as he discusses proven methods of bypassing popular physical security controls and employees, using only publicly available tools and social engineering. You'll hear war stories from assessments, and the frightening simplicity of gaining unauthorized physical access to many things from server rooms to Top Secret Ops rooms. These assessments will be broken down to discuss the various social engineering and physical security bypass methods and tools used, as well as remediation recommendations.

**11:40 am** **Personal Security 101**

**Presenters: Rob Gray**, Senior Director of Executive Security Programs and Operations, Cox Enterprises, Inc.

**Eric Powell**, Chief Security Officer, Bayshore Global Management LLC

In a world where social media makes personal privacy a challenge, how can you keep your family safe? Just as you have a process for evaluating business and investment risks, the process for assessing personal security risks should help you identify areas of vulnerability and outline strategies for mitigating those risks. From travel safety to the bodyguard skill sets, this session will give you the information, tips and tools you need to make smart, practical decisions about personal security for you and your family.

**12:30 pm** **Luncheon Session - Cybersecurity: Policies and Practices for Every Family**

**Presenter: Cory R. Lunn, CISA**, IT Assurance Manager, Wolf & Company, P.C.

With cyber breaches making headlines with increasing frequency and magnitude and as more and more family offices have become targets of cyberattacks, it is no surprise that concerns about cybersecurity keep family office executives awake at night. During this working lunch, you'll learn how to have productive conversations with family members about this important topic, how to enhance your current practices, and what steps you can take to develop and maintain a strong cybersecurity program.

**1:45 pm** **Closing Remarks and Adjournment**

## REGISTRATION QUESTIONS

Registration for this workshop is open to members of the Family Office Exchange who have an interest, stake, or expertise in security for their Family Office. FOX Advisor members may send an appropriate senior-level technology professional. All registrations are subject to approval by FOX.

Do you have a dedicated security resource?

- Yes  No

If yes, are they on staff or have you outsourced?

- On Staff  Outsourced

Have you done any security/risk planning around any of the following types of security? (Check all that apply)

- Cybersecurity
- Personal Security
- Physical Security
- Financial Security
- I have not done any Security/Risk Planning

Please select which Luncheon you would like to attend on Wednesday, July 18:

- FOX Technology Operations and Data Security Network
- General Networking Luncheon

Will you attend the workshop reception at 5:00 pm?

- Yes  No

Will you attend the workshop breakfast at 7:45 am?

- Yes  No

Do you plan to book a guest room at Swissotel Chicago?

- Yes, I plan to stay at Swissotel.
- No, I do not plan to stay at Swissotel.
- I'm not sure, my plans are not finalized.

Registrants are expected to make their own hotel reservations.

## QUESTIONS?

Contact us at [events@familyoffice.com](mailto:events@familyoffice.com) or call 312.327.1221

## THREE WAYS TO REGISTER

1. Scan and email to: [events@familyoffice.com](mailto:events@familyoffice.com)
2. Register online at: [www.familyoffice.com/FSW](http://www.familyoffice.com/FSW)
3. Fax this form to: [1.312.327.1212](tel:13123271212)

## ATTENDEE INFORMATION

Name (First/Last)

Name of Firm/Family Office

Title/Position

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

E-mail

Do you have any dietary or special needs?

## REGISTRATION FEES

FOX MEMBER		NON-MEMBER*	
First Paid Attendee	Additional Paid Attendee	First Paid Attendee	Additional Paid Attendee
<input type="checkbox"/> \$1,250	<input type="checkbox"/> \$1,000	<input type="checkbox"/> \$1,550	<input type="checkbox"/> \$1,300

## PAYMENT METHOD

Payment by check is enclosed. (Check payable in U.S. dollars to Family Office Exchange)

Please mail check to: **Family Office Exchange**  
**ATTN: Events**  
**100 South Wacker Drive, Suite 800, Chicago, IL 60606**

To pay by credit card please call the Events Team directly at 1.312.327.1221 and provide credit card details. Note: credit card payments over \$7,500.00 are subject to a 3.5% fee on the entire payment.

For event registrations, refunds of payment or forum allotments will be offered if the cancellation is made in writing to Family Office Exchange at [events@familyoffice.com](mailto:events@familyoffice.com) five (5) or more business days prior to the start of the event. For more information regarding complaints or administrative policies please call 312-327-1200.



Family Office Exchange is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.NASBARegistry.org](http://www.NASBARegistry.org).

**Field of Study: Finance** - Up to 7 CPE credits can be earned by attending this event. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures and acceptance may vary by state.

**Program Level: Overview | No prerequisites are required for any of the sessions.**  
**Delivery Method: Group Live Program**

**Learning Objectives:** Upon completion of the program, participants will be able to identify the latest developments and solutions regarding physical, personal, and digital security risks for ultra-high net worth families.