

Tuesday, July 14, 2020

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All times are in Central Time

10:00 am **Welcome**

Gaby Griffin, Market Leader, Business Owners and Family Office Executives, Family Office Exchange

10:10 am **Highlights from the 2020 FOX Global Investment Survey**

Miguel López de Silanes, Managing Director for International Members, Family Office Exchange

Identifying the trends and issues affecting families of wealth is a large part of our mission at FOX. We'll explore what's top-of-mind for members through the latest results of our 2020 Global Investment Survey.

10:30 am **What Now? The Economy, Investing, and Elections**

Jeff Brown, Managing Partner, Political Economy, LLC, Board Chair, CFM Partners, Inc.

Covid-19 may accelerate the impact of several already evident trends in politics, the economy, and financial markets. Will economic concentration, along with wealth and income disparity, continue to grow? The U.S. and China were already battling over trade, but will how each handled the pandemic lead to a full-blown cold war? Will globalization reverse and what does that mean for public and private investors? How will the pandemic drive November's U.S. elections? Which industries and companies did the virus and lockdowns forever change? We will explore these questions and more during our virtual session.

11:20 am **Break**

11:30 am **Uncorrelated Strategies: Preparing for the Ride Ahead**

Andrew Eberhart, Managing Partner, Wingspan Capital

Hans Vaule, CFA, CAIA, Managing Director, Cambridge Associates

Moderator: Charles B. Grace III, Managing Director, Family Office Exchange

During up markets, like those of the last 10 years, good returns can lull investors into a sense of complacency. But what are their exposures and strategies if markets head down or go sideways? What are the perceived marketplace risks and what questions should they be asking? Which lessons from the past are relevant and which aren't? We'll dive into the value of uncorrelated strategies, with a look at alternative investments, including private equity funds and hedge funds.

12:20 am **Wrap-Up**

12:30 pm **Day 1 Concludes**

Wednesday, July 15, 2020

10:00 am Introduction to Day 2

Glen W. Johnson, Chief Operating Officer, Family Office Exchange

10:05 am Harnessing the Power of Artificial Intelligence

Stephen Martiros, Founder and CEO, Financial Building Blocks

Rudina Seseri, Founder and Managing Partner, Glasswing Ventures

In less than a decade, artificial intelligence (AI) has gone from a fringe research topic to a reality, revolutionizing industries across the sophistication spectrum. If you haven't implemented AI yet, you soon will. So it's essential you understand AI's transformative nature, its real-world successes and future potential, and what sets companies that use AI apart. Rudina Seseri of Glasswing Ventures and Stephen Martiros of Financial Building Blocks will share perspectives on AI's current trends, applications, and opportunities to drive productivity and reshape the world.

10:55 am Break

11:05 am The Dynamic Ecosystem of Blockchain, Bitcoin, and Cryptocurrency

Thomas J. Anderson, Author, *Money Without Boundaries*

New York Times best-selling author, and technology innovator Thomas J. Anderson will help you connect old currency ideas to new technologies. As billions of dollars pour into blockchain and cryptocurrency - with trillions more depending on the outcome - investors need to form their own conviction hierarchy around this emerging and dynamic ecosystem. We'll explore the implications of, and use cases for these emerging technologies and currencies, and discuss the potential for a megatrend convergence. You'll gain a greater understanding of the foundational concepts, as well as how future trends may affect industries, markets, government, and policy.

11:55 am Wrap-Up

12:00 pm Day 2 Concludes

Thursday, July 16, 2020

10:00 am **Introduction to Day 3**

Sara Hamilton, Founder and CEO, Family Office Exchange

10:05 am **Vertical Approach to Venture Investing**

Constance Freedman, Founder and Managing Partner, Moderne Ventures

Technology trends like AI, robotics, blockchain, and cybersecurity are poised to seismically change global industry, what is their true potential for investment impact? Constance Freedman will talk about assessing general investment strategies against large vertical opportunities, how you should think about true market sizes, which firms are most likely to succeed, and how an investor can add value and get involved. You'll hear real-world examples of successful partnerships between family offices, corporations, and industry executives who have found unique investment opportunities and created meaningful value by applying a vertical approach to a general venture strategy.

11:05 am **Break**

11:15 am **Peer Dialogues**

FOX Direct Investing Network

Open to FOX Direct Investing Network members and investors, and family offices interested in discussing direct investment opportunities.

FOX Strategic Investors

Open to wealth owners and single-family offices.

FOX Advisors

Open to all FOX member advisors from multi-family offices and investment advisory firms, as well as FOX specialist advisors.

12:00 pm **Day 3 Concludes**

Friday, July 17, 2020

10:00 am **Introduction to Day 4**

Bill Sullivan, President, Family Office Exchange

10:05 am **The Emerging Influence of Social Impact Investing**

Catherine Berman, CEO, CNote

Kristin Hull, Ph.D., Founder and CEO, Nia Impact Capital

Scott Saslow, Founder and CEO, ONE WORLD

As more investors align their investment strategies with their social values, considerable debates have grown too. Can impact investing deliver market-rate returns? What opportunities exist for investing in areas such as gender equality, climate, or a particular community? What practical steps have other family offices taken to realize competitive rates and achieve measurable social impact? Learn about the opportunities and challenges, as well as what's happening across the social impact industry, during a "fireside chat" with two active social impact investors.

10:55 am **Break**

11:05 pm **Innovation's Impact on Investment Opportunities**

Robert C. Wolcott, Co-Founder & Chairman, TWIN Global; Adjunct Professor of Innovation, Kellogg School of Management at Northwestern, Booth School of Business, University of Chicago

With Covid-19, we've all crossed the Digital Rubicon. Professor Wolcott will offer foresight about the next few years and beyond, and what it might mean for business leaders and investors.

11:55 am **Wrap-Up**

12:00 pm **Forum Concludes**