

# FOX GLOBAL INVESTMENT FORUM

March 21–22, 2023  
Dallas, TX & Virtual

At the heart of every family office is one goal – to sustain wealth for generations to come. Over the course of two days, join fellow family office investment professionals to gather and discuss the latest global investment themes, markets, economies, and more.

Our sessions will provide expert viewpoints on what will shape the investing landscape as well as insights from leading family office investors. The forum will provide an opportunity to develop meaningful investing relationships with peers from FOX families through an exchange of ideas and discussions.

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*“The FOX Global Investment Forum addresses risks and opportunities in the current investment environment – and goes beyond this to focus on issues of interest to families with generational wealth including the role of values-based investing.”*

–Past Forum Attendee

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## WHO SHOULD ATTEND

In-person registration for this event is for family office members of FOX. Family members from all investment skill levels are encouraged to attend. FOX advisor members may send an appropriate senior-level investment person.

All FOX Members, and qualified non-members, may attend the program virtually.

For questions regarding eligibility please contact your relationship manager or reach out to [events@familyoffice.com](mailto:events@familyoffice.com)

## DIRECT INVESTING DINNER

*All times listed in U.S. Central Time*

Monday March 21 | 6:30 pm

*Open to Single Family Offices and Wealth Owners*

## IN-PERSON FORUM SCHEDULE

*All times listed in U.S. Central Time*

Tuesday, March 21 | 8:00 am – 7:00 pm

Wednesday, April 22 | 7:45 am – 12:30 pm

## VIRTUAL FORUM SCHEDULE

*All times listed in U.S. Central Time*

Tuesday, March 21 | 9:00 am – 5:30 pm

Wednesday, April 22 | 8:30 am – 12:30 pm

## KEYNOTE SPEAKERS



**Jeffrey Kleintop, CFA**  
Managing Director,  
Chief Global Investment  
Strategist, Charles  
Schwab

Jeffrey Kleintop is responsible for analyzing and discussing international markets, trends, and events to help U.S. investors understand their significance and financial implications. Mr. Kleintop is frequently cited in a range of national media outlets and is a regular guest on high-profile news networks. Mr. Kleintop has been cited in The Wall Street Journal as one of “Wall Street’s best and brightest”. Mr. Kleintop is the author of the investing book Market Evolution: How to Profit in Today’s Changing Financial Markets, published by John Wiley & Sons.



**Joe Dowling**  
Global Head of BAAM,  
Blackstone

Joe Dowling oversees and leads all of BAAM’s investment activities. Prior to joining Blackstone, Mr. Dowling led Brown University’s endowment, including as Chief Executive Officer from 2018 to 2020 and Chief Investment Officer from 2013 to 2018. Mr. Dowling also served as interim Chief Financial Officer of the University from 2019 until 2020, leading all finance and treasury functions as well as cash and debt management. Before joining Brown University, he was the Founder and Chief Executive Officer of Narragansett Asset Management, where he managed funds for institutions, pension funds, and endowments.

*For a full bio of the keynote speakers visit [familyoffice.com/learning-programs/forums/2023-fox-global-investment-forum-presenters](https://familyoffice.com/learning-programs/forums/2023-fox-global-investment-forum-presenters)*

## FEATURED SESSIONS

### 2023 Global Macroeconomic Outlook

Join FOX as we kick off the 2023 forum with Jeff Kleintop, Charles Schwab’s Chief Global Investment Strategist. Jeff will lead us through the ever-changing landscape of global economies, economic trends, and a cadre of other influences impacting family office investors. Explore and understand influences from inflation, global recession, and war in Europe to other key components impacting future risks and opportunities.

### Examining the Impact of Fundamental Global Investment Themes

Panelists will discuss two highly relevant post-pandemic investment themes, Supply Chain and Energy. Join industry experts as they walk through the current state of these highly disrupted industries, key drivers and pitfalls impacting potential investment opportunities, and where families could find long term potential and harness these disrupted and dynamic industries.



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## TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at [familyoffice.com/GIF23](https://familyoffice.com/GIF23) or contact your relationship manager. For questions, please contact us at [events@familyoffice.com](mailto:events@familyoffice.com)

	IN-PERSON	VIRTUAL	
	MEMBER	MEMBER	NON-MEMBER
INDIVIDUAL ATTENDEE	Credit or US \$2,750	US \$495	US \$895
MULTIPLE ATTENDEES FROM THE SAME FAMILY	Credit or US \$2,500	US \$495	US \$895

Up to 8 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. Please visit the forum website for additional information.

## VENUE AND ACCOMMODATIONS

**The Joule**  
1530 Main Street  
Dallas, TX 75201

FOX has reserved a limited number of rooms at The Joule at a discounted nightly rate.

Make your hotel reservation **online** or call 214.748.1300 and reference the FOX Global Investment Forum by February 27, 2023 in order to obtain the special conference rate.  
*(subject to room availability)*

Forum attendees are responsible for making their own accommodation arrangements.

## FEATURED SESSIONS

### Family Office Chief Investment Officer Perspectives: Investing Globally

Join Miguel López de Silanes Gómez as he explores how dynamic global markets and geo-politics have impacted global family office CIO's from around the world. Learn how panelists navigated 2022 through both their local and regional investing lens as well as beyond their respective borders. Learn what is shaping their thinking and better understand where they see risk and opportunity.

### Unpacking the Middle Market M&A Landscape

Join a panel of leading lower and middle market M&A professionals as they cover market updates, M&A trends, and insights into the private equity and debt markets. Our panelists will explore how market conditions and global considerations are impacting private equity and what the road ahead might look like for family investors.

### Virtual Fireside Chat: The Road Ahead for Global Investing

Join an experienced global asset allocator for a virtual fireside chat exploring the global macro investing environment at large. Understand which strategies performed best in 2022, including hedge funds, and further, which strategies are best poised to perform well in a period of high volatility and uncertainty, and how these strategies should be deployed within family portfolios.

## FORUM SPONSORS

### EXECUTIVE SPONSOR



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ASSET  
MANAGEMENT

\*Recently re-branded  
to 360 ONE Asset.

### EXHIBITING SPONSOR

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### MEDIA SPONSOR

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