

FOX 30<sup>TH</sup> ANNIVERSARY FORUM

# Celebrating and Connecting Families of Impact

OCTOBER 28-30 | JW MARRIOTT | CHICAGO, IL



## Agenda at a Glance



This year's Forum marks a significant milestone as we celebrate a generation of working closely with families, family offices, and trusted advisors. Participants will gain insight directly from successful families of impact as they share their challenges and successes in bridging multiple generations. Our featured families will share stories about building resilience across generations, planning for leadership succession, and engaging family members in the process.

We will offer a wide range of interactive sessions and the opportunity to visit with old friends and network with new ones in our unique peer community. Additionally, join us for a celebratory 30<sup>th</sup> Anniversary all-member dinner at Chicago's beautiful Theater on the Lake.

### MONDAY, OCTOBER 28

Families, Family Office Executives,  
FOX Thought Leaders Council Members

- 9:30 am** Registration Opens
- 10:30 am** Introduction to the FOX Community and Speed Networking
- 12:30 pm** Luncheon and Seminar Introductions
- 2:00 pm** **Family Seminars**
  - SEMINAR 1**  
On the Minds of International Families
  - SEMINAR 2**  
Engaging the Rising Generation
  - SEMINAR 3**  
Direct Investing Best Practices and Case Studies
  - SEMINAR 4**  
Family Office Trends and Best Practices
  - SEMINAR 5**  
Being an Effective Trustee and a Responsible Beneficiary
- 6:00 pm** Cocktail Reception and Dinner at the Chicago Cultural Center

### TUESDAY, OCTOBER 29

All FOX Members

- 8:00 am** Breakfast and Registration
- 9:00 am** Looking Forward to New Challenges
- 9:30 am** Gen 1-2: Designing a Shared Vision for the Hojel Family
- 11:15 am** Gen 2-3: Leadership Transition: From Preparation to Empowerment with the Gallardo Family
- 12:30 pm** Luncheon
- 1:45 pm** Gen 4-6: Family Engagement Program Crafted by the Todd Family
- 3:15 pm** Peer Dialogues and Advisor Briefing
- 4:45 pm** Adjournment
- 6:00 pm** Transportation to All Member Dinner
- 6:30 pm** All Member Dinner at Theater on the Lake

### WEDNESDAY, OCTOBER 30

All FOX Members

- 8:00 am** Breakfast and Registration
- 9:00 am** Opening Remarks
- 9:15 am** Looking Forward: The Future of Wealth Management
- 10:45 am** The Future of the Family Office
- 11:45 am** Rising Gen Perspectives: What We Want Our Parents to Know
- 12:45 pm** Closing Remarks
- 1:00 pm** Grab 'n Go Lunch

## FOX Rising Gen Forum | Oct 27-28, 2019

**Bring the entire family to celebrate the 30<sup>th</sup> Anniversary! An exclusive Forum is available to family members in their 20s, 30s and 40s.**

Opportunities to build relationships, have authentic conversations, and gain action-oriented new ideas. Connect, learn, and gain insights from shared family experiences and stories:

- The experiences of a G5 family member in fostering impact and philanthropy
- Family Succession: the good, the bad, and the ugly
- Learn how to be an effective and engaged beneficiary

For a detailed agenda and more information on the 2019 Rising Gen Forum, please visit: [www.familyoffice.com/RGFF](http://www.familyoffice.com/RGFF)

### SUNDAY, OCTOBER 27

- 1:00 pm** Registration Opens
- 2:00 pm** Opening Remarks & Discovery Session
- 3:00 pm** Crafting Impact
- 4:00 pm** Rising Gen Peer Dialogues
- 6:30 pm** Cocktail Reception & Dinner

### MONDAY, OCTOBER 28

- 8:00 am** Networking Breakfast
- 9:10 am** Generation Succession
- 10:00 am** Ask the Expert: Roundtable Discussions with FOX Subject Matter Experts
- 11:15 am** The Engaged Beneficiary
- 12:15 pm** Closing Remarks & Staying Connected

## Presenters

### Ana Gallardo

Co-Chair, Strategy Committee,  
Gallardo Family Group

### Carlos Gallardo

Co-Chair, Strategy Committee,  
Gallardo Family Group

### Phyllis C. Hojel

Gen 1 Founder,  
HM International, LLC

### Richard C. Hojel

Gen 2 Family Leader,  
HM International, LLC

### Andrew Hull

Chief Executive Officer,  
Todd Family Office

### Greg McCann

Founder and Principal,  
McCann & Associates

### Michael Montgomery

Chief Executive Officer, Ford Estates, LLC  
and Brush Street Investments, LLC

### Michael Nelson

Chief Administration Officer,  
AMWAY

### Charles Reid

Family Director, Todd Family Office;  
Chair, Todd Family Council

### Carl Robinson, Ph.D.

Founding Partner, Vantage Leadership

### Bill Sullivan

Vice President, Global Head of  
Financial Services Market Intelligence,  
Capgemini

### Wayne Osborne

Co-founder and Chief Executive  
Officer, Way2B1

### Maurizio Petta

Chief Executive Officer, Seragnoli  
Family Office

## Accommodations



### JW Marriott Chicago

151 West Adams Street, Chicago, IL  
60603 Phone: 312.660.8200

FOX has reserved a limited number of rooms at the JW Marriott Chicago at a rate of \$299 per night plus applicable taxes. To obtain this discounted rate, please contact the JW Marriott Chicago directly at 1.877.303.0104 and mention the "Family Office Exchange" or complete your reservation online at: <https://book.passkey.com/go/FamilyOfficeExchangeForum>

Forum 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, October 2, 2019.

## Family Office Exchange Presenters

### Ann Dugan

Senior Managing Director,  
Advisory and Education Services

### Mindy Kalinowski Earley

Chief Learning Officer

### Ruth Easterling

Managing Director, Member Services

### Charles B. Grace, III

Managing Director, Advisory and  
Education Services

### Sara Hamilton

Founder and Chief Executive Officer

### Nate Hamilton

Advisory Board Member

### Glen W. Johnson

Market Leader, Business Owners  
and Family Office Executives

### Robin L. Letchinger

Market Leader, Enterprise Families

### Patience Marmer

Senior Relationship Manager

### Cary Nourie

Director, Direct Investing Network

### Miguel López de Silanes Gómez

Managing Director, Market Leader  
for Europe and Latin America

## Exhibitors



alterDomus\*

EzeCastle  
INTEGRATION

FundCount  
WE GO BEYOND THE NUMBERS

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SEI ARCHWAY

WHEELS UP™



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 11 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 gain insight directly from successful families of impact as they share their challenges and successes in bridging multiple generations. Participants will also explore topics, such as: international trends, the state of the family office industry, transition planning, the impact of technology, and leadership development.

9:30 am **Registration Opens**

10:30 am **Introduction to the FOX Community and Speed Networking (Optional)**

12:30 pm **Luncheon and Seminar Introductions**

2:00 pm **Family Seminars - All Seminars Designed and Moderated by FOX**

Please choose one of the following seminars. Open to Family Members, Single Family Office Executives, and FOX Thought Leaders Council Members.

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**SEMINAR 1 On the Minds of International Families**

**Charles B. Grace, III, Managing Director, Advisory and Education Services, Family Office Exchange**  
**Miguel López de Silanes Gómez, Managing Director, Market Leader for Europe and Latin America, Family Office Exchange**

Roundtable discussions will bring together leaders from international families for in-depth discussions on areas of significant interest to wealth owners from around the world.

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**SEMINAR 2 Engaging the Rising Generation**

**Ann Dugan, Senior Managing Director, Advisory and Education Services, Family Office Exchange**  
**Mindy Kalinowski Earley, Chief Learning Officer, Family Office Exchange**  
**Michael Nelson, Chief Administration Officer, AMWAY**  
**Carl Robinson, Ph.D., Founding Partner, Vantage Leadership**

Amway Corporation leadership and Gen 2 family members will share how they deepened engagement with next generation, including designing an Ambassador Program, establishing pathways to employment, and creating an idea lab. Participants will engage in activities to develop other avenues for engagement.

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**SEMINAR 3 Direct Investing Best Practices and Case Studies**

**Cary Nourie, Director, Direct Investing Network, Family Office Exchange**  
**Nate Hamilton, Advisory Board Member, Family Office Exchange**

Understand the good, the bad, and the promise of direct investing. Members of the FOX DIN Network will share their insights and experiences with direct investing and provide valuable lessons and best practices they have learned. This session will involve roundtable discussions of current deal activity.

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**SEMINAR 4 Family Office Trends and Best Practices**

**Glen W. Johnson, Market Leader, Business Owners and Family Office Executives, Family Office Exchange**  
**Patience Marmer, Senior Relationship Manager, Family Office Exchange**

This session will highlight new trends and shifts in office complexity and operations based on the recent FOX Family Office Benchmarking Survey. We will facilitate discussion among participants to help consider how to evolve services, talent, and technology.

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**SEMINAR 5 Being an Effective Trustee and a Responsible Beneficiary**

**Ruth Easterling, Managing Director, Member Services, Family Office Exchange**  
**Robin Letchinger, Market Leader, Enterprise Families, Family Office Exchange**

A trustee of family trusts must understand the legal duties and deliver them with a keen appreciation of family dynamics. We will discuss the range of trustee and beneficiary responsibilities as well as practical tips for making the trustee-beneficiary relationship work effectively. Members will share their experiences as trustees.

6:00 pm **Cocktail Reception and Dinner**

For Families, Single Family Office Executives, and FOX Thought Leaders Council Members. Join us at the Chicago Cultural Center's Preston Bradley Hall for dinner under the spectacular Tiffany Dome. *Shuttle service will be provided.*

**8:00 am Breakfast and Registration****9:00 am Looking Forward to New Challenges****Sara Hamilton, Founder and Chief Executive Officer, Family Office Exchange**

Family Office Exchange is thrilled to be celebrating 30 productive years as the pre-eminent community for Families of Impact and their family offices. The FOX Founder will reflect on the past and preview the opportunities and challenges that lie ahead.

**9:30 am Gen 1-2: Designing a Shared Vision for the Hojel Family****Phyllis C. Hojel, Gen 1 Founder, HM International, LLC, Mexico****Richard C. Hojel, Gen 2 Family Leader, HM International, LLC, Mexico**

Ricardo Hojel was a unique Mexican business owner who preferred partnership over personal control. He launched several companies in his lifetime, maneuvering past physical handicaps thanks to the tremendous support from his wife, Phyllis Hojel, and their four children. At the time of his death, he had an extensive network of business owner peers, oversight of a number of operating companies, and a portfolio of diverse properties. Before Ricardo became ill, his oldest son, Richard Hojel, stepped in to learn the operating companies, and with his siblings and their spouses, created a shared governance process that the Gen 3s are now eager to understand.

**10:45 am Networking Break****11:15 am Gen 2-3: Leadership Transition: From Preparation to Empowerment with the Gallardo Family****Ana Gallardo, Co-Chair, Strategy Committee, Gallardo Family Group, Spain****Carlos Gallardo, Co-Chair, Strategy Committee, Gallardo Family Group, Spain**

Two leaders in a Gen 3 cousin's group from Barcelona will share their transition described as "many years in training to finally moving to the playing field" in their Enterprise Family. They will outline the triggering event for their transition, the process they went through to define their Gen 3 vision for the future together, and how they used the Strategy Committee roles to establish their credibility. They will explore today's current leadership structure and how they are preparing the 4th generation for ownership and future leadership.

**12:30 pm Luncheon****1:45 pm Gen 4-6: Family Engagement Program Crafted by the Todd Family****Charles Reid, Family Director, Todd Family Office; Chair, Todd Family Council, New Zealand****Andrew Hull, Chief Executive Officer, Todd Family Office, New Zealand**

Representatives from a Gen 4-7 New Zealand family will share their plans for keeping 200+ family members connected and committed to the family enterprise. They will highlight their recent initiatives to foster family engagement and collaboration. The Todd family office leader will describe the changes that have occurred in the office to ensure client satisfaction and how their strategic planning process has evolved to remain relevant to the family.

2:45 pm **Networking Break**

3:15 pm **Peer Dialogues for Family Members and Family Office Executives**

The peer discussions will allow participants to reflect on the three case studies and the insights gained from these family stories. Each participant will be able to build their own timeline for changes they will encounter in the coming decade and how these changes might be addressed.

**FAMILY MEMBER DIALOGUES** *Open to Family Members*

Gen 1 & 2	Gen 3 & 4	Gen 5+	International Families Gen 1 - 3	International Families Gen 4 - 6
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**OFFICE EXECUTIVE DIALOGUES** *Open to Single Family Office Executives*

<b>Small Family Offices</b> (1-6 employees)	<b>Medium Family Offices</b> (7-14 employees)	<b>Large Family Offices</b> (15+ employees)
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3:15 pm **Advisor Briefing: Serving as a Catalyst for Change**

*Open to FOX Thought Leaders Council Members and other Advisors.*

**Ann Dugan, Senior Managing Director, Advisory and Education Services, Family Office Exchange**  
**Greg McCann, Founder and Principal, McCann & Associates**

Each business owner and business-owning family are unique, with distinct characteristics and interests. Our presenters will share insights from FOX proprietary research and their own experiences working with business owners to lead a discussion on how advisors can help families manage challenges, navigate transitions, and engage in difficult conversations more effectively. Based on insights and observations from the family stories shared throughout the day, advisors will discuss their own experiences and approaches in guiding families. This interactive session will help advisors walk away with actionable steps to support family leaders through transitions and change.

4:45 pm **Adjournment**

6:00 pm **Transportation to All Member Dinner**

*Shuttle service will be provided.*

6:30 pm **All Member Dinner at Theater on the Lake**

Join us for a dinner celebrating the 30<sup>th</sup> Anniversary of the Family Office Exchange at Theater on the Lake, a historic, prairie style building on Chicago's lakeshore, featuring breathtaking views of the Chicago Skyline.



**8:00 am Breakfast and Registration**

**9:00 am Opening Remarks**

**9:15 am Looking Forward: The Future of Wealth Management**

**Bill Sullivan, Vice President, Global Head of Financial Services Market Intelligence, Capgemini**

**Wayne Osborne, Co-founder and Chief Executive Officer, Way2B1**

**Maurizio Petta, Chief Executive Officer, Seragnoli Family Office**

**Moderator: Sara Hamilton, Founder and Chief Executive Officer, Family Office Exchange**

Following a briefing on how technology will reshape the role of the family office and wealth advisor in the coming decade, we will hear from leaders who are on the front lines of that change. Wayne Osborne will share new insights into buying behavior among wealth owners as they come to trust, and rely on, technology. Maurizio Petta will share perspectives on how wealth management will offer a broader role for the family office to play. You will not want to miss these valuable insights into the future.

**10:15 am Networking Break**

**10:45 am The Future of the Family Office**

**Michael Montgomery, Chief Executive Officer, Ford Estates, LLC  
and Brush Street Investments, LLC**

**Moderator: Glen W. Johnson, Market Leader for Family Business and Office Executives,  
Family Office Exchange**

*Additional panelists to be announced*

The family office of the next decade will have the opportunity to offer a broader array of services for their family clients – from financial health, personal health and security, lifestyle management, property management, business management to risk management across all these dimensions. The talent transformation will be a critical challenge – recruiting and training staff to engage with clients in new ways and in new roles. This panel of experienced family office executives will discuss change management, talent management, and how to organize process improvements to enhance value for family clients.

**11:45 am Rising Gen Perspectives: What We Want Our Parents to Know**

**Nate Hamilton, Advisory Board Member, Family Office Exchange**

**Moderator: Mindy Kalinowski Earley, Chief Learning Officer, Family Office Exchange**

*Additional panelists to be announced*

A panel of rising generation family members will reveal what they'd like the leadership generation to know about what they bring to the table, and the challenges and opportunities they see for their families. They will share insights about what they want to learn, how they want to use technology, and how to best engage them in the future enterprise.

**12:45 pm Closing Remarks**

**1:00 pm Grab 'n Go Lunch**

# Registration Form

# FOX 30<sup>TH</sup> ANNIVERSARY FORUM Celebrating and Connecting Families of Impact



Register online at  
[www.familyoffice.com/30TH](http://www.familyoffice.com/30TH)



Scan and email to  
[events@familyoffice.com](mailto:events@familyoffice.com)



Fax this form to our  
Events Team at [312.327.1212](tel:312.327.1212)

## ATTENDEE INFORMATION

Select information will be used for your Forum badge, including city and state.

Name (First/Last) \_\_\_\_\_

Nickname (For event nametag if different than above.) \_\_\_\_\_

Title \_\_\_\_\_

Family/Firm Name \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_

Country \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

## REGISTRATION OPTIONS AND FEES

### Wealth Owners, Family Members, and Family Office Executives

	FOX Member	Non-Member	Use Event Credit
<b>FOX 30th Anniversary Forum Only (Oct. 28-30)</b> Additional discounts are available for multiple attendees, please contact your relationship manager for more information.	\$2,600	\$3,250	<input type="checkbox"/>
<b>FOX 30th Anniversary Forum (Oct. 27-30)</b> PLUS FOX Rising Gen Forum - Sun. 10/27 through Wed. 10/30	\$2,900	\$3,600	<input type="checkbox"/>
<b>FOX Rising Gen Forum Only (Oct. 27-28)</b> Includes FOX 30 <sup>th</sup> Anniversary Forum Family Seminars and Dinner on 10/28	\$1,900	\$2,400	<input type="checkbox"/>
<b>FOX Thought Leaders Council Members</b>			
<input type="checkbox"/> FOX 30 <sup>th</sup> Anniversary Forum Only (Oct. 28-30) Use Event Credit Included in FOX Membership			

## 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 S. Wacker Drive, Suite 800, Chicago, IL 60606**

To pay by credit card please call the Events team directly at **312.327.1221** and provide credit card details.

Please select one: I am a

- Wealth Owner  FOX Thought Leaders Council Member  Family Member  
 Trustee  Board/Council Member  Beneficiary  Family Office Executive

If you are a Family Leader/Wealth Owner please select your generation:

- Gen 1  Gen 2  Gen 3  Gen 4  Gen 5 or Greater  NA

What key problem or priority are you trying to solve?  
\_\_\_\_\_

Is this your first time attending this program? (formerly the FOX Fall Forum)

- Yes  No

Will you stay at the JW Marriott during the Forum?

Attendees are responsible for reserving their own accommodations for the Forum.

- Yes, I plan to stay at the JW Marriott  Not sure, my plans are not finalized  
 No, I do not plan to stay at the JW Marriott

Do you have any special dietary or accessibility needs?  
\_\_\_\_\_

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.

## FOX 30<sup>TH</sup> ANNIVERSARY FORUM SELECTIONS

### MONDAY, OCTOBER 28

Will you attend the following?

- Optional Speed Networking at 10:30 am  Luncheon at 12:30 pm  
 Cocktail Reception and Dinner at 6:00 pm

Please select one family seminar:

- On the Minds of International Families  
 Engaging the Rising Generation  
 Direct Investing Best Practices and Case Studies  
 Family Office Trends and Best Practices  
 Being an Effective Trustee and a Responsible Beneficiary

### TUESDAY, OCTOBER 29

Will you attend the following?

- Breakfast at 8:00 am  Luncheon at 12:30 pm  
 All Member Dinner at 6:30 pm

Please select one Family Member or Office Executive Dialogue, or the Advisor Briefing Session:

**Family Member Dialogues** (Open to Family Members)

- Gen 1 & 2  Gen 3 & 4  Gen 5+  
 International Families Gen 1-3  International Families Gen 4-6

**Office Executives Dialogues** (Open to Single Family Office Executives)

- Small Family Offices (1-6 employees)  
 Medium Family Offices (7-14 employees)  
 Large Family Offices (15+ employees)

**Advisor Briefing: Serving as a Catalyst for Change**

(Open to FOX Thought Leaders Council Members and other Advisors)

- Yes, I will attend  No, I will not attend

### WEDNESDAY, OCTOBER 30

Will you attend Breakfast at 8:00 am?

- Yes, I will attend  
 No, I will not attend

Would you like a Grab 'n Go Lunch at 1:00 pm?

- Yes, I will have a Grab 'n Go lunch  
 No, I will not have a Grab 'n Go lunch

## FOX RISING GEN FORUM SELECTIONS

Please select your age range:  20-29  30-39  40+

I play an active role in the family office/business:

- Yes  No  Preparing to

What is your role in the family office/business? (current or potential role)  
\_\_\_\_\_

My biggest challenge as a member of the rising generation is:  
\_\_\_\_\_

I'd like to talk to a FOX Subject Matter Expert about:  
\_\_\_\_\_

### SUNDAY, OCTOBER 27

Will you attend the Rising Gen Dinner Reception at 6:30 pm?

- Yes  No

### MONDAY, OCTOBER 28

Will you attend the Networking Breakfast at 8:00 am?  Yes  No

Do you plan to join us for Monday afternoon Family Seminars and Dinner?  Yes  No

(If yes - Please be sure to make the appropriate selections in the Fall 30<sup>th</sup> Anniversary Forum section above)

ALL REGISTRATIONS SUBJECT TO APPROVAL BY FOX.