

FOX RISING GEN LEADERSHIP PROGRAM

SEPTEMBER 26-27, 2019 | CONVENE CONFERENCE CENTER | CHICAGO, IL



Expand your knowledge of the essential leadership building blocks to help prepare for your role in life and in the family:



**PERSONAL
IDENTITY AND
GROWTH**



**PERSONAL
LEADERSHIP
SKILLS**



**PERSONAL
FINANCE**



**SHARED
OWNERSHIP AND
ENGAGEMENT**



**GOVERNANCE
AND BOARD
READINESS**

About the FOX Rising Gen Leadership Program

Convene Conference Center | Chicago, IL | September 26-27, 2019



Family Office Exchange (FOX) is pleased to present the inaugural Rising Generation Leadership Program for the preparation of future family leaders. The learning series is focused on educating future family leaders so they are armed with the quantitative and qualitative skills needed to thrive in life, business, and wealth stewardship. Participants will attend educational sessions and engage in peer networking and experiential activities.

This education program will cover five diverse subject areas needed to be an equipped, informed, and contributing leader to the family enterprise. These courses are the essential building blocks for family leadership preparation, and part of an overall core curriculum that will be presented at future FOX Rising Gen Leadership Programs.

Participants in the program will obtain knowledge as they pursue their careers and increased credibility within the family. Additionally, interacting with a peer community will allow rising generation family members to have honest and informative conversations addressing their unique questions related to family, business and leadership.

For 30 years FOX has been sharing experiences, education, and guidance with families, family offices, and advisors. FOX is delighted to present this important program to empower future family leaders and equip them with a leadership toolkit for the future.

WHO SHOULD ATTEND

Registration for the FOX Rising Gen Leadership Program is open to family members in their 20's, 30's and 40's. All registrations will be interviewed by FOX staff.

AGENDA AT A GLANCE

DAY 1 AGENDA Thursday, September 26		DAY 2 AGENDA Friday, September 27	
8:30 am	Registration and Breakfast	8:30 am	Breakfast
9:00 am	Introduction and Networking Activity	9:00 am	Reflection/Remarks
10:30 am	Personal Skills Inventory and Assessments	9:15 am	Responsible Ownership and Stewardship
12:00 pm	Lunch	10:45 am	Break
12:45 pm	Personal and Family Leadership Roles	11:15 am	Peer Learning Experiences
2:15 pm	Networking Break	12:15 pm	Luncheon
2:45 pm	Basic Financial Literacy	1:00 pm	Board Readiness and Skills
4:15 pm	Family Case Study/Experience	2:30 pm	Reflection
6:00 pm	Cocktail Reception & Dinner	3:00 pm	Program Adjourns

MODULE A



PERSONAL IDENTITY AND GROWTH

PERSONAL SKILLS INVENTORY AND ASSESSMENTS

First, know yourself. Before leading others, you must be certain of who you are and what you bring to the table. This course offers the opportunity to harness the power of self-awareness by developing a keen understanding of your own skills, abilities and interests. Engage with skill assessments that will strengthen your knowledge of self, while simultaneously allowing you to fine-tune your learning and career goals. Inform your work environment and life goals with a sense of purpose. Take this opportunity to strengthen your voice and confidently engage in the activities of your family.

MODULE B



PERSONAL LEADERSHIP SKILLS

PERSONAL AND FAMILY LEADERSHIP ROLES

How do you cut through the fog of disruption, heated familial competition, or morphing succession plans to establish yourself as a worthy contributor capable of leading a family business? Families need exemplary command to weather storms of all kinds, and this course will name the traits necessary to become the person your family looks to in times of growth and change. While there are a wide range of leadership styles and paths towards leadership, certain habits will take you farther than others in the context of a family. Choose which style fits your personality best as you become acquainted with various leadership models and embolden your approach towards that leadership position you've been eyeing with deliberate practice in the presence of industry professionals.

MODULE C

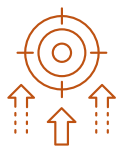


PERSONAL FINANCE

BASIC FINANCIAL LITERACY—AN OVERVIEW

Possessing basic financial literacy is a skill that will serve you well in your personal life and within your family. The skills honed in this session will help you establish a strong foundation as you acquire terminology and principles that you can apply regardless of your experience and education. You will be able to engage in financial discussions with confidence, and become empowered as an informed steward of your wealth. Leave this session with language that will lead you to greater financial awareness and independence.

MODULE D



SHARED OWNERSHIP AND ENGAGEMENT

RESPONSIBLE OWNERSHIP AND FAMILY STEWARDSHIP

This session will explore the many roles in an enterprise family and help you develop an owner's mindset. Learn how to make an impact through responsible engagement, and understand the overlap of family values, vision, and stewardship. This session will help you identify what is appropriate for proper engagement when part of a family enterprise involves shared ownership. And discover different pathways to craft a shared vision with other key members of your family.

MODULE E



GOVERNANCE AND BOARD TRAINING

BOARD READINESS AND SKILLS

Members of successful families are recognizing the role governing boards play in the preservation of their family enterprise. Having well-organized governance systems to promote family unity is pivotal. No matter your family's size or current structure, this course provides a foundational understanding of the core elements of family governance. This includes ways to establish clear expectations for board members, processes for group decision-making in families and clear understanding of required behavior and protocol. We will explore behaviors that indicate board readiness so that you walk into your first board meeting equipped for success and impact.



FACULTY



MINDY KALINOWSKI EARLEY, CMP, CFBA

Chief Learning Officer, FOX Family Learning Center™

Mindy Earley is Chief Learning Officer for Family Office Exchange. In her role, she works to foster integrated learning programs for enterprise families and is responsible for developing the family learning community. She provides support to the Family Learning and Experience Council and FOX Family Learning Network. Mindy is inspired by helping people learn, grow and discover the way that they will make personal and productive contributions, using their strengths and talents.

Mindy has held various roles in small and large family offices and has been responsible for creating and stewarding professional learning networks in support of human and intellectual capital. She has designed learning experiences that increase the knowledge base and enhance the life path of individuals while providing personalized support and coaching to help them meet their goals.



SARA HAMILTON

Founder and CEO, Family Office Exchange

Sara Hamilton is the Founder and CEO of Family Office Exchange (FOX). Sara is a recognized visionary and credited with professionalizing the family office industry. Sara founded FOX in 1989 as a peer network for family office executives. Within 10 years, FOX could see that families needed help with their enterprise vision, managing financial transitions, and educating family members on responsible ownership.

Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting family enterprises, family office executives, and wealth advisory firms in more than 27 countries. FOX has built a unique team of professionals serving multi-generational families, led by 20 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, San Francisco, and Madrid.



STEPHEN MARTIROS

FOX Business Advisory Board Member

Stephen is founder and CEO of Financial Building Blocks® a cloud-based financial education software platform, and Chair of the Babson Institute for Family Entrepreneurship. He previously served as Managing Partner of CCC Alliance, a Boston-based network of single-family offices; and is the founder of Summitas, a software company that provides family offices and investment advisors with a secure portal for collaboration.



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.

FIELD OF STUDY: Finance | Up to 7.5 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 this program, participants will gain an understanding of how to assess their own learning style, learn leadership skills for earning authority, receive an overview of personal financial literacy, and will learn tools and skills for board training and stewardship.

FOX Rising Gen Leadership Program Registration

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REGISTRATION QUESTIONS

Registration for the FOX Rising Gen is open to family members in their 20s, 30s and 40s, who are aspiring leaders within their family's enterprise. All registrations subject to approval by FOX.

Please select your age range:

☐ 20-29 ☐ 30-39 ☐ 40+

Please select your generation in the family:

☐ Gen 1 ☐ Gen 2 ☐ Gen 3 ☐ Gen 4
☐ Gen 5 ☐ Gen 6 ☐ Unknown

What is your role in the family today?
(current or potential role)

What is your desired role in the future?

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

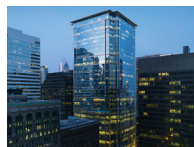
Will you attend the following meals on
September 26?

☐ Breakfast
☐ Lunch
☐ Cocktail Reception & Dinner

Will you attend the following meals on
September 27?

☐ Breakfast
☐ Lunch

PROGRAM VENUE



Convene
16 W Adams St
Chicago, IL 60603

ACCOMMODATIONS

Convene has discount arrangements with a number of conveniently located hotels. Please visit the program website at www.familyoffice.com/RGLP for additional details.

QUESTIONS?

Contact us at events@familyoffice.com
or call 312.327.1221

THREE WAYS TO REGISTER

1. Scan and email to:
events@familyoffice.com

2. Register online at:
www.familyoffice.com/RGLP

3. Fax this form to:
1.312.327.1212

Space is limited. All attendees must register online or submit this registration form prior to the event to secure a seat.

ATTENDEE INFORMATION: Select information will be used for your badge, including city and state.

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

First Paid Attendee

☐ \$3,600

Additional Paid Attendees

☐ \$3,250

FOX Non-Member*

First Paid Attendee

☐ \$4,500

Additional Paid Attendees

☐ \$4,050

If you are not a member of
Family Office Exchange, please contact
info@familyoffice.com
for membership information.

PAYMENT METHOD

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

Please mail check and
this registration form 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 or register online at www.familyoffice.com/RGLP

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 will be offered if the cancellation is made in writing to Family Office Exchange at 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.