FOX WEALTH ADVISOR FORUM™

BUILDING THE ADVISORY FIRM OF THE FUTURE - **NOW**

MAY 1-2, 2019 | THE JOULE | DALLAS, TX

This year's **FOX Wealth Advisor Forum** will focus on how to effectively evolve your firm in the midst of great change. As an industry, we are seeing massive transitions across client demographics, talent, the skills needed to deliver an optimal client experience, and unparalleled technological disruption. Many advisors are preparing to address change...now.

Join us on May 1-2 in Dallas for a learning and networking experience that will be rewarding and action-oriented. The fresh perspectives and actionable recommendations from industry experts and your peers will equip you to confidently build the advisory firm of the future.

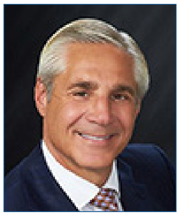
- Expert speakers will offer insights to help you better understand trends related to evolving client needs, the industry, and the workforce.
- You will learn practical solutions for building strong teams, developing strategic skills to build better client relationships, and differentiating your own firm as a leader within a crowded landscape.
- The forum will provide multiple opportunities for networking with the most accomplished advisors in the industry, structured peer dialogue discussions, and a session focused on professional skill development.

Presenters, Venue, and Hotel Accommodations

FOX Wealth Advisor Forum™ | The Joule | Dallas, TX

GUEST PRESENTERS

Rebecca Bales
Global Partner
Lumina Learning, USA



David Satler
Senior Client Partner
Korn Ferry

Michael Dalis
Author, *Sell Like a Team*,
Managing Partner
DRIVE Sales Consulting, LLC

Drew McMorrow
President & Chief Executive Officer
Ballentine Partners

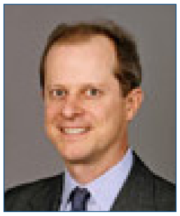
Wally Head
Vice Chairman
Gresham Partners, LLC

Hardeep Walia
Founder and Chief Executive Officer
Motif

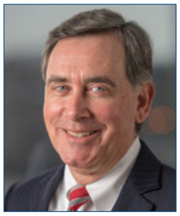
FOX PRESENTERS

Ann Dugan
Senior Managing Director,
Advisory and Education Services
Family Office Exchange

Alexandre Monnier
President
Family Office Exchange



Charles B. Grace, III
Managing Director
Family Office Exchange



David Toth
Managing Director
Family Office Exchange

VENUE AND HOTEL ACCOMMODATIONS

The Joule Dallas
1530 Main Street
Dallas, TX 75201

www.thejouledallas.com

FOX has reserved a limited number of rooms at The Joule at a rate of $299 per night plus applicable taxes. To obtain this discounted rate, please contact reservations after Wednesday, February 6 at 1.214.748.1300 and mention Family Office Exchange.

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 Thursday, April 4, 2019.**

11:30 am Registration

12:00 pm Networking Luncheon

1:00 pm Welcome

Alexandre Monnier, President, Family Office Exchange

Identifying the trends and issues with an immediate impact on families of wealth is a large part of our mission at FOX. We'll explore what's on the minds of members, including the changing needs and demographics of owners, trends regarding asset allocation, the family office of the future, the shifting talent paradigm, and much more.

1:50 pm The Growing Power of Women Owners

Presenter to be announced

Women in the U.S. exercise decision-making control of over $11.2 trillion in investable assets, and with the entrepreneurial nature of the rising generation, the number of female wealth owners is expected to grow dramatically. According to research, a large amount of this wealth is not currently being managed by advisors. Closing this gap will require correcting industry perceptions about female wealth owners. Join us as we explore how the growing power of women owners will reshape the ultra-wealth business forever and how advisors can harness proven tactics to win the industry's biggest growth market.

2:40 pm Networking Break

3:10 pm Understanding the Needs and Nuances of Owners

Ann Dugan, Senior Managing Director, Advisory and Education Services, Family Office Exchange

Each business owner is unique, with distinct characteristics and interests. Gain insights from FOX proprietary research and experience working with business owners, whether your practice is focused on G1 founders or G2+ multi-generational families evolving to family enterprises. You will walk away from this session with actionable steps to support your work with family leaders.

4:00 pm Sparking Effective Communication and Interpersonal Skills

Rebecca Bales, Global Partner, Lumina Learning, USA

In this highly interactive and engaging professional development session, we will focus on communication and interpersonal skills that can be utilized to raise our self-awareness around behaviors and personality. By exploring these key skills, we will gain an understanding of how to better connect and interact with colleagues and clients.

5:15 pm Adjourn

5:30 pm Networking Reception & Dinner

> *"Attending this event is an outstanding return on your investment. Top quality in every respect. You will not be disappointed. Education material and research are a 10."*
>
> *-Previous Forum Attendee*

8:00 am Registration and Networking Breakfast

9:00 am Welcome Back - Connecting the Dots

David Toth, Managing Director, Family Office Exchange

9:10 am Preparing for the Global Talent Crunch

David Satler, Senior Client Partner, Korn Ferry

A major commercial crisis is coming, and it could cost nations and businesses $8.5 trillion in unrealized revenue by 2030 – equivalent to the combined GDP of Germany and Japan. The threat: chronic skilled talent shortages. According to Korn Ferry, it will impact growth for businesses and nations as soon as 2020. By 2030, there will be a global talent shortage of 85.2 million skilled workers, with the knowledge-intensive financial services industry one of the hardest hit. In this session, we'll examine what this means for the financial services industry, what advisor firms can do to prepare, and examples of what industry leaders have done to mitigate the threat.

10:00 am Trends in Integrated Wealth Advisor Selection

Panelists: Wally Head, Vice Chairman, Gresham Partners, LLC

Drew McMorrow, President & Chief Executive Officer, Ballentine Partners

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

It's no surprise that the integrated wealth advisory industry focused on ultra-high net worth families is highly competitive. This session will take a smart look at the selection process from the perspective of families and advisors. The discussion will cover trends in advisor selection as well as key elements driving the search process. What are families doing to identify the right advisors and what are they seeking? How are successful advisors attracting clients? Case studies and examples will be explored to derive lessons learned by advisors and families during this session.

10:50 am Networking Break

11:10 am Team-based Selling: How to Win More Business by Selling Together Effectively

Michael Dalis, Author, *Sell Like a Team*, Managing Partner, DRIVE Sales Consulting, LLC

Gone are the days of meeting a client for lunch, chatting about your offering, and closing the sale over dessert. Clients today look different from those of the past. They make networked purchasing decisions by committee, with diverse roles, interests, and backgrounds. With access to more information and a greater ability to share it, they demand value, access, and alignment from their counterparts.

Sales is now a team sport, and to win you must build and manage selling squads that work in complete alignment – not just during client meetings, but before and after, as well. In this session, author Michael Dalis will guide us through the process of creating and managing selling squads that execute and win in every sales meeting or pitch. He'll offer a groundbreaking guide that will provide everything needed to create and organize selling squads that not only win, but win more frequently.

12:10 pm Networking Luncheon

1:10 pm Peer Dialogues

Join your peers in high-level, face-to-face roundtable discussions about topics of most concern to wealth advisors. Each table will be focused on generating strategic conversations to share ideas and solutions for business decisions ahead.

2:10 pm Networking Break

2:25 pm Thematic Investing: Harnessing Artificial Intelligence and Data Science to Build the Portfolio of the Future

Hardeep Walia, Founder and Chief Executive Officer, Motif

The premise of thematic investing is seductively simple. Markets over the long-term are driven by earnings growth and thematic investing looks to identify long-term trends that are likely to drive disproportionate earnings growth in the future. Artificial intelligence, for example, isn't just about the next revolution of computing. It will change everything from how we communicate, to how we commute. An aging population isn't just going to inflate the health care industry. It will reshape everything from urbanization to unions. Figuring out how these trends play out in the global economy is a complex problem.

In this cutting-edge talk, Hardeep Walia will explain how data science and A.I. can be used to uncover the most important trends driving the economy and quantify the companies with maximum exposure to these trends. He'll also demonstrate how dynamic thematic models can be created and implemented in a portfolio.

3:25 pm Closing Remarks

3:30 pm Adjourn

"A great environment to interact with the best advisors in the family office industry as well as to learn and reflect on critical wealth management issues."

-Previous Forum Attendee

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 **8.5 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 the program, participants will be able to understand trends related to evolving client needs, the industry and workforce. Participants will also gain practical strategies for building strong teams, skills to build better client relationships, and approaches to standing out as a thought leader within a crowded landscape.

FOX Wealth Advisor Forum™ Registration

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30 YEARS

REGISTRATION QUESTIONS

ALL REGISTRATIONS SUBJECT TO APPROVAL BY FOX.

Is this your first time attending the FOX Wealth Advisor Forum?

❍ Yes ❍ No

Do you plan to book a guest room at The Joule Dallas?

❍ Yes, I plan to stay at The Joule.
❍ No, I do not plan to stay at The Joule.
❍ I'm not sure, my plans are not finalized.

Please note, registrants are expected to make their own hotel reservations. Please see page two for accommodation information.

What key takeaway do you hope to gain at the FOX Wealth Advisor Forum?

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____
____

What is your top concern about the changing landscape of the ultra-high net worth business?

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____
____

Which two topics would you like to discuss in peer-to-peer dialogues?

❍ Attracting and Retaining Talent
❍ Selling as a Team
❍ Other________________________________

Will you attend the following:

❍ Networking Luncheon on May 1
❍ The Forum Reception and Dinner on May 1
❍ Breakfast on May 2
❍ Networking Luncheon on May 2

If you were referred to this event, please advise who referred you.

____
____
____

Is there anyone you would like to refer to this program?

____
First Name

____
Last Name

____
Email Address

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/waf2019
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 forum 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	FOX Member	FOX Non-Member*
☐ Use Event Credit Included in FOX Membership Fee	First Paid Attendee ☐ **$1,975**	First Paid Attendee ☐ **$2,475**
	Additional Paid Attendees ☐ **$1,775**	Additional Paid Attendees ☐ **$2,225**

Promo Code:

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 **familyoffice.com/waf2019**.
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 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.