

FOX Family Forum

October 26-28, 2021
Chicago, IL
and Virtually

For the first time since 2019, join your peers in-person at the 2021 FOX Family Forum in Chicago or virtually. At this compelling three-day in-person and virtual program, family members, office executives, and their trusted advisors will hear how other families have achieved positive change and successfully transitioned to future generations.

Attendees will come away with ideas, tools, and frameworks to help identify the next steps that lead to being a positive and productive enterprise for the future.

From 2020 Forum Attendees

"It is a good opportunity to learn from others and get new ideas about best practices and supporting the family enterprise."

"Provides valuable insight to all aspects of the business of the family!"



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VIRTUAL FORUM SCHEDULE

TUESDAY, OCTOBER 26

9:30 am – 12:30 pm

*Reserved for Family Members, Family Office Executives,
and FOX Thought Leaders Council Members*

WEDNESDAY, OCTOBER 27

9:00 am – 2:20 pm

Open to all FOX Members

THURSDAY, OCTOBER 28

9:00 am – 12:15 pm

Open to all FOX Members

IN-PERSON FORUM SCHEDULE

TUESDAY, OCTOBER 26

10:00 am – 4:15 pm | Followed by Dinner

*Reserved for Family Members, Family Office Executives,
and FOX Thought Leaders Council Members*

WEDNESDAY, OCTOBER 27

9:00 am – 4:30 pm | Followed by Dinner

Open to all FOX Members

THURSDAY, OCTOBER 28

9:00 am – 12:15 pm

Open to all FOX Members

*Up to 10.5 credits can be earned by attending this event in person, and up to 8 can be earned by attending this event virtually. Requirements, compliance procedures, and acceptance may vary by state. Please visit the forum website for additional information.



FEATURED SESSIONS

We Need to Talk: The Hidden Impact of Wealth

Jennifer Risher and her husband became extra-lucky beneficiaries of the dot-com boom. But sudden wealth had its challenges. Jennifer will share her thought-provoking, personal story that explores the hidden impact of wealth on identity, relationships, and sense of place in the world. At a time when money is still a taboo subject even among those closest to us, her memoir, *We Need to Talk*, is a catalyst for conversation that demystifies wealth and inspires us to connect. After sharing her story with at FOX's Rising Gen Forum, Jennifer will share some takeaways from that discussion as well.

Supporting Mental Wellness in Families and Businesses

The past two years have tested even the most resilient families who have been challenged with balancing domestic obligations with home schooling and managing companies virtually. In the best of times, family held enterprises often have complex dynamics due to the relationships between employees. Given the uncertainty in the world, it is unsurprising that the rate of anxiety, depression and substance use are at all-time highs. Family enterprises will thrive if they balance promoting financial sustainability with maintaining the mental health and wellness of their workforce. Don't miss this interview-style session to learn more about innovative ways that advisors, employers, and family members can achieve positive mental wellness during times of uncertainty.

Plus Deep-dive Seminars on:

- Addressing Mental Well-being, Substance Abuse, and Cognitive Decline in Families
- Ensuring a Smooth Leadership Succession Process
- Family Office Trends and Solutions – with Case Studies

Evolution Across Generations: The Caroline Rose Hunt Family Story

Caroline Rose Hunt was the 3rd child of H.L. Hunt Jr. an American oil tycoon and entrepreneur. She established her family enterprise in the early 1980s, focusing on hotels and leisure, and exited in 2011. Today the enterprise holding company, The Rosewood Corporation, has a centralized ownership structure, headed by John Dziminski, enterprise president. John oversees three diversified business lines including oil and gas exploration, private equity direct investments, and real estate direct ownership. John also oversees the family office, the family's private trust company for all family trusts, and manages the trustee function. John will take attendees through the journey of Caroline Hunt's family enterprise evolution.

Own It: How to Develop a Family Enterprise Mindset

Any owner at any age can gain ownership-related perspective and skills contributing to greater family harmony and business success. With two other authors, Gaia Marchisio, executive director at Cox Family Enterprise Center at Kennesaw State University, has written a book providing enterprising families and their advisors examples and practical advice to promote knowledge, skills, and capabilities – incorporating a broad range of topics spanning personal and interpersonal, leadership and wealth, business, ownership, and financial. Learn how to build "ownership literacy" in your family, along with a genuine sense of stewardship.

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WHO SHOULD ATTEND

- FOX members, including family members, family office executives and advisors, are encouraged to experience this forum.
- Please note that event credits or a registration fee will be required to attend in-person.
- For questions regarding in-person attendance eligibility please contact your relationship manager.
- All FOX members may attend virtually, with unlimited attendees from your firm.
- Please note qualified non-members can virtually attend this event. Please email events@familyoffice.com for more information.

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at familyoffice.com/FF21 or contact your relationship manager. For questions, please contact us at events@familyoffice.com.

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FEATURED SESSIONS

The Role of Independent Board Members in Bringing New Insights to the Family

This experienced panel of family leaders will share their insights from working with independent directors on governing boards (both Gen 2 and Gen 5 perspectives). They will describe the benefits derived from adding independent directors and how to find the right people for these important roles. We will explore how independent directors help balance the tension between supporting the family's legacy and enabling the enterprise to find new opportunities to thrive during challenging times.

New Frontier Investment Opportunities

Direct investors are forging new paths into frontier investing on a daily basis. Ag tech, crypto, artificial intelligence, low carbon, blockchain, and others are just some of the trends rushing onto the investment scene as ideas become reality. Join us as we explore investing trends and insights into this fast-moving and exciting space of next-generation wealth creation.

Intelligent Family Offices: Changing Our Way of Thinking and Operating

Family office technology continues to grow at an exponential rate. While the new technologies are exciting, many family offices are still dealing in old data methods. The technologies of the early aughts are no longer sufficient for future client demands but changing them isn't like changing a light bulb. What challenges and opportunities should you be ready for? Which systems should you evolve first? What do you need to get your data ready for the transformation? What steps can you take to prepare for the family office of the future and better serve your clients? The answers include a new way of thinking and a new operational approach.

The forum will also feature in-person peer dialogues and in-person breakout sessions.