

FOX Family Office Forum

July 20-21, 2021
Virtual Event

Join your family office peers virtually at the 2021 FOX Family Office Forum™. This compelling two-day virtual program will bring together C-suite family office executives, senior managers, HR managers, technology heads, and family members to discuss the common challenges family office leaders and advisors are actively addressing.

From 2020 Forum Attendees

"If in the family office space this forum is a must, you get so much information from so many different perspectives."

"FOX has distilled mountains of data and observations down to 6 hours over 3 days. You will certainly leave with wisdoms and new ideas that you can implement immediately."



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VIRTUAL FORUM SCHEDULE

Tuesday, July 20, 10:00 am - 3:20 pm

Wednesday, July 21, 9:00 am - 1:00 pm

WHO SHOULD ATTEND

All FOX members are welcome and encouraged to have unlimited attendees participate in the virtual program.

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at familyoffice.com/FOF21 or contact your relationship manager. For questions, please contact us at events@familyoffice.com.

*Up to 7 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.



FEATURED SESSIONS

2021 Trust and Estate Planning Update

Don't miss this annual Family Office Forum update. Income and estate tax changes are highly probable, and speculation abounds regarding potential regulatory developments, all of which could significantly impact family offices and individuals. Learn what to watch and what, if anything, you might consider doing to protect your family and clients.

Navigating the Evolving Insurance Landscape

This session will address changes to UHNW property and casualty insurance, D&O, and life insurance that family offices must consider. Panelists will explain what steps need to be taken to minimize risk across multiple family units and guarantee that all family members being served by the family office are protected.

Honing Your Change Management Skills

Change is inevitable. To successfully adapt and navigate change, families and offices need to continue to develop and hone their skills around change management. Devising an intentional approach to change is critical for family offices to ensure positive transitions while mitigating disruptions. Learn how to create a structured approach to change management so that your family and family office is prepared to meet the challenges ahead.

The Happy Middle - A Hybrid Work Environment

In the last year, workers around the globe have experienced remote work, not by choice, but by necessity. Not surprisingly, many have found it a positive experience and hope they can continue working remotely even after the pandemic is over. Others miss the office and can't wait to get back. No one size fits all. Now that the pandemic is coming to an end, organizations have an important decision to make. Stick with remote working, return to the office or something in the middle.

Leadership in a New Era

This session will reveal and examine the skills needed to be an effective leader in the post-pandemic era.

The forum will also feature Technology User Group Roundtable Meetings, Forum Sponsor Zoom Rooms, and Breakout Sessions.