

# FOX Global Investment Forum

April 20-22, 2021  
Virtual Event

The **FOX Global Investment Forum** will explore what's on the investing universe horizon, direct investing trends, impact investing, meaningful public equities changes, opportunities in the real estate market, and more.

This year's forum will provide an opportunity to connect with peers for a meaningful exchange of ideas and discussions about what the future of investing holds.

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*"What differentiates this forum from other investment-related conferences is the focus on Family Office needs and their unique challenges."*

*- 2020 Virtual Forum Attendee*

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## FORUM SCHEDULE (U.S. Central time)

Tuesday, April 20, 10:00 am – 12:15 pm

Wednesday, April 21, 10:00 am – 2:00 pm

Thursday, April 22, 10:00 am – 12:15 pm

## WHO SHOULD ATTEND

All FOX members, including family office executives and advisors, are encouraged to attend this forum.

## TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at [familyoffice.com/GIF21](https://familyoffice.com/GIF21) or contact your relationship manager. For questions, please contact us at [events@familyoffice.com](mailto:events@familyoffice.com).

\*Up to 6 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

### Compassion Coupled with Return: Use Capital to Create Equal Opportunity

Join 30-year investing veteran Valerie Mosley, Founder of BrightUP and Chief Executive Officer of Valmo Ventures, as she delivers an eye-opening presentation that examines factors permeating wealth inequality in the United States. Valerie will provide compelling personal stories and explain how investors can create reasonably priced funds and capital for the greater good.

### Risks and Returns: Invest in Asia

US-China tension is a key market driver in 2021. Join expert panelists as they discuss the family office investment landscape in Asia with a focus on China.

### Speed Network to Make Deals

If you are interested in deal-making, this session is for you. Attendees will be put into breakout rooms of their choice based on deal interest. Bring your investing expertise and an explanation of how you can add value to a deal. *Please note this session is only open to families and single family office executives.*

### Learn Lessons from a Successful Serial Investor

Barry Dorfman, Founder and President of BLD Holdings, Inc. is an active investor in early-stage deals who has invested in over 150 deals since leaving his medical practice. Barry will share lessons learned from the early stages, how he identifies strong partners, his family office structure that includes two CIOs, and more.

### The forum will also feature breakout sessions on:

- Navigating the Direct Investing Deal Ecosystem
- Meaningful Public Equities Changes and the Impact on Investors
- What's New in Family Office Alternative Investments?
- The Art and Science of Managing Investment Managers
- Finding Opportunity in the 2021 Real Estate Market
- Family Impact & ESG Investing: Building a Holistic Portfolio