



FOX RISING GEN VIRTUAL FORUM

FOX Rising Gen Virtual Forum
May 25-26, 2021

“An informative and well-run forum with fascinating expertise and friendly guidance. A brilliant way to understand and learn from your peers.”

– 2020 Attendee

The **2021 FOX Rising Gen Forum** is an opportunity for family members in their 20's, 30's, and 40's, at all levels of experience to develop genuine connections with peers in similar situations and explore best practices in overcoming the challenges facing ultra-wealthy families. This virtual forum will unpack the nuances of family investment committees, explain direct investing, go in-depth on family boards, and more, all while allowing attendees to forge meaningful relationships and bond over shared experiences.



The FOX Rising Gen Virtual Forum offers an interactive and engaging environment to focus on thought-provoking topics:

- Learn what family investment committees are all about and how to feel confident joining yours.
- Hear from your peers about how they're navigating their family boards and governance structures.
- Discover how to confidently assess a direct investment deal.
- Learn how to manage the challenges that come with a dominant family leader.
- Understand how your relationship with money impacts your overall wellbeing.
- Find out more about the FOX Rising Gen Leadership Program and if it's right for your own personal development.
- Join your fellow Rising Gen community for a virtual happy hour where you'll connect with peers, exchange ideas, and create a sense of community with one another.

All times Central

DAY 1 AGENDA: Tuesday, May 25

10:00 AM	Welcome, Introductions, Icebreaker
10:25 AM	Unpacking the Family Investment Committee
11:15 AM	Break
11:30 AM	Breakout Sessions
	<ul style="list-style-type: none"> • Foundations of Direct Investing • Family Investment Committees 101 • Family Investment Committees: Intermediate and Advanced
12:20 PM - 12:50 PM	The Rising Gen Leadership Program: The Knowledge You Need
5:00 PM	Virtual Happy Hour

DAY 2 AGENDA: Wednesday, May 26

10:00 AM	Welcome and Introductions
10:05 AM	Family Boards: Everything You Ever Wanted to Know
10:55 AM	Break
11:10 AM	Breakout Sessions
	<ul style="list-style-type: none"> • Navigating Challenging Family Leadership • Family Boards 101 • Family Boards: Intermediate and Advanced
12:00 PM	Break
12:15 PM	How Our Relationship with Money Impacts Wellbeing
1:05 PM	Closing Remarks



Tuesday, May 25, 2021

UNPACKING THE FAMILY INVESTMENT COMMITTEE

1.0 CPE | Field of study: Specialized Knowledge

Presenters: TBA

What's the first step in investing if you're given the opportunity? How do you collaborate effectively within a committee of family members tasked with investing a portion of wealth? If you already have an investment committee formed, how do you report back to the family governing body or refine best practices? These questions and more will be addressed by seasoned FOX members with deep family investment committee experience.

BREAKOUT SESSIONS

FOUNDATIONS OF DIRECT INVESTING

1.0 CPE | Field of study: Specialized Knowledge

Presenters: **Nate Hamilton**, CFA, FOX Business Advisory Board Member
Johnathan Tunner, Director, Private Investment Opportunities, FOX

This session will feature a condensed walk-through of how to source, screen, and evaluate a direct investment opportunity.

FAMILY INVESTMENT COMMITTEES 101

1.0 CPE | Field of study: Specialized Knowledge

Presenters: **David Toth**, Managing Director, FOX
Gaby Griffin, Market Leader, Business Owners and Family Office Executives, FOX

Are you or your family considering forming an investment committee? This session is for attendees who want to dig deeper into the process of forming an investment committee, and what goes into launching one.

FAMILY INVESTMENT COMMITTEES: INTERMEDIATE AND ADVANCED

1.0 CPE | Field of study: Specialized Knowledge

Presenters: TBA

If you are part of a family that has already formed an investment committee, or you're involved with an investment committee in some way, this session is for you. Attendees will discuss amongst each other and garner feedback from peers.

THE RISING GEN LEADERSHIP PROGRAM – THE KNOWLEDGE YOU NEED

Presenters: **Mindy Kalinowski Earley, CMP, CFBA**, Chief Learning Officer, FOX

Spend 30 minutes with FOX's Chief Learning Officer, Mindy Kalinowski Earley, to learn more about the Rising Gen Leadership Program and how the program can help you achieve your goals. This session is an open house format and conversational in nature.

VIRTUAL HAPPY HOUR

Hosts: **Mindy Kalinowski Earley, CMP, CFBA**, Chief Learning Officer, FOX and **Heather Abramson**, Director, FOX



Wednesday, May 26, 2021

FAMILY BOARDS: EVERYTHING YOU EVER WANTED TO KNOW

1.0 CPE | Field of study: Specialized Knowledge

Moderator: **Scott Winget**, Market Leader, Enterprise Families, FOX

This session will address the reasons to create a family board, how to get on your family board if you're interested in doing so, and what a good governance structure looks like. After an hour-long panel, attendees will have the opportunity to break into small groups and discuss family boards at a more granular level based off their experience.

BREAKOUT SESSIONS

NAVIGATING CHALLENGING FAMILY LEADERSHIP

1.0 CPE | Field of study: Specialized Knowledge

Presenter: **Jeff Strese**, Family Learning & Leadership Consultant, FOX

Is your family led by a strong-minded leader whose decision-making overrules all others? In this discussion, attendees will learn how to navigate dominating family leaders. Attendees will learn tools and tactics to help their family engage in shared decision-making and consensus building when dealing with a difficult family leader.

FAMILY BOARDS 101

1.0 CPE | Field of study: Specialized Knowledge

Presenters: **Scott Winget**, Market Leader, Enterprise Families, FOX
Ruth Easterling, Managing Director, Member Services, FOX

This discussion is for those new to family governance who would like to understand the genesis of boards and best practices upon inception.

FAMILY BOARDS: INTERMEDIATE AND ADVANCED

1.0 CPE | Field of study: Specialized Knowledge

Presenter: **Sara Hamilton**, Founder and CEO, FOX

This breakout discussion is for attendees whose family already has a family board established and may be interested in serving on that board. This session will review the characteristics and duties of established boards.

HOW OUR RELATIONSHIP WITH MONEY IMPACTS WELLBEING

1.0 CPE | Field of study: Specialized Knowledge

Presenters: **Nathan Dungan**, Founder and President, Share Save Spend®

How we talk about money matters. It affects our quality of life and our wellbeing. Too often, today's consumer culture shapes our money habits and values. This can lead to consequences such as increased stress and diminished wellbeing — regardless of net worth. Nathan will discuss how all of us can think positively and proactively about our finances and our future — including bringing values into the equation when making decisions about money.



FIELD OF STUDY: Specialized Knowledge | Up to 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 Internet Based

LEARNING OBJECTIVES: Upon completion of the program, participants will be able to understand best practices in overcoming the challenges facing ultra-wealthy families. Attendees will learn how to manage the complexities of family investment committees, describe the basics of direct investing, and how to serve on a family board.

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.



PROGRAM REGISTRATION

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

HOW TO REGISTER

Registration is open to Rising Gen family members at all levels of experience in their 20's, 30's and 40's. There is no limit on attendance per family, we encourage multiple members of a family to attend.

- If you are not a member of Family Office Exchange, please contact info@familyoffice.com for membership information.
- Advance registration is required. All Attendees must register on-line, or submit this form by **May 18, 2021** to participate.

Email: events@familyoffice.com

Online: familyoffice.com/RGF21

Phone: [312.327.1221](tel:312.327.1221)

ATTENDEE INFORMATION

As part of the FOX Rising Gen Virtual Forum, FOX will utilize a mobile app, desktop portal, and attendee networking function that includes an attendee listing section, allowing attendees to contact each other during the forum. Within the attendee listing, your first and last name as submitted in your registration will be automatically visible to all FOX Rising Gen Virtual Forum attendees, unless you decline below.*

- I agree to my name appearing in the attendee listing.
- I do NOT agree to my name appearing in the attendee listing.

Name (First/Last)*

Name of Firm/Family Office*

Title/Position*

Street Address*

City*

State/Province*

Country*

Zip/Postal Code*

Phone*

E-mail*

REGISTRATION QUESTIONS

Please select your age range:*

20-29

30-39

40+

Please select your generation in the family:*

G1

G2

G3

G4

G5

G6

Unknown

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

What is your desired role in the future?*

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

What's one family leadership challenge you'd like addressed at the forum?

What do you want to learn when it comes to direct investing?

What questions do you have about governance that you'd like to be addressed?

Where is your Family Office Located?*(city/state)

Where do you currently live?*(city/state)

Please select which sessions you plan to attend:*

Day 1 Sessions: Tuesday, May 25, 2021

Unpacking the Family Investment Committee

The Rising Gen Leadership Program – The Knowledge You Need

Breakouts – only choose 1

Foundations of Direct Investing

Family Investment Committees 101

Family Investment Committees: Intermediate and Advanced

Will you attend Virtual Happy Hour on May 25? Yes No

Day 2 Sessions: Wednesday, May 26, 2021

Family Boards: Everything you ever wanted to know

How Our Relationship with Money Impacts Wellbeing

Breakouts – only choose 1:

Navigating Challenging Family Leadership

Family Boards 101

Family Boards: Intermediate and Advanced

*Indicates a required field, and must be completed before submitting form via email.

Cancellation Details: All cancellations must be made in writing to Family Office Exchange at events@familyoffice.com. For more information regarding administrative policies please contact FOX office at: [312.327.1200](tel:312.327.1200).