FOX WEALTH ADVISOR FORUM

May 18-19, 2022
Chicago, IL and Virtually

Take your personal and professional growth to the next level at the 2022 FOX Wealth Advisor Forum. This year's forum will address the myriad of transitions that families are experiencing and how advisors can help them navigate.

Additionally, growth is on the mind of advisory firms everywhere, and the educational sessions and networking opportunities presented at this year's event will help advisors manage this time of unprecedented progress.

"The forum was effective in helping me continue to grow as an advisor. I better understand the changing dynamics of the families I serve and am motivated by the focus on developing future leadership."

- 2021 Forum Attendee

FOX

FOX WEALTH ADVISOR FORUM

May 18-19, 2022
Chicago, IL and Virtually

FORUM SCHEDULE (U.S. Central time)

Wednesday May 18, 11:00 am – 5:00 pm

Wednesday May 18, 6:00 pm Dinner Reception

Thursday, May 19, 8:00 am – 12:30 pm

WHO SHOULD ATTEND

Registration for this event is for advisor members of FOX. All FOX members may attend virtually, with unlimited attendees from your family or firm.

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at **familyoffice.com/WAF22** or contact your relationship manager. For questions, please contact us at **events@familyoffice.com**.

INDIVIDUAL ATTENDEES	**Credit or US $2,500**
MULTIPLE ATTENDEES FROM THE SAME FAMILY	**Credit or US $2,250**

*Up to 5.5 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. Please visit the forum website for additional information.

KEYNOTE

Winning on Purpose: The Case for Putting the Client First

Customer experience leaders outperform the market 2 to 1, so why are more companies not fully embracing Customer Purpose? Join us for an interactive discussion with Maureen Burns, who is a leader in Bain & Company's Customer practice work within the Financial Services industry. Maureen deals extensively with clients on topics related to marketing excellence, the Net Promoter System®, customer journey redesign, and digital transformation.

MAUREEN BURNS
Partner, Bain & Company

Maureen Burns is a senior partner in Bain's Customer practice. She is one of Bain's foremost experts on the Net Promoter System and Customer Loyalty.

Maureen has led some of Bain's most notable digital transformations, helping her clients harness technology and data to earn Customer Loyalty. Maureen earned an MBA from Harvard Business School and graduated from Georgetown University's School of Foreign Service. She is based in Boston.

ENHANCING YOUR EXPERTISE (EYE) IN HOT TOPICS

Wealth specialists and advisors can only be experts in so many areas. These bite-size, 30-minute presentations will help attendees feel more confident during conversations relating to common challenges impacting the family office industry.

- **EYE: Family Histories**
  Sharing, documenting, and preserving family narratives are an important part of wealth planning and governance. This session will explore how family histories can set a foundation for connection and continuity.
- **EYE: Strategic Philanthropy**
  As the rising gen gets more involved in family systems, and as ESG and social justice come to the forefront, many families are reevaluating their giving strategies. Join this session to learn more about strategic philanthropy.
- **EYE: Private Trust Companies**
  Speakers will cover the basics of what a Private Trust Company (PTC) is, including answering common questions your clients may have about them.
- **EYE: Blockchain and Digital Assets**
  Blockchain and digital assets are not going away and continue to intrigue. FOX's Nate Hamilton will share what you should know about this rapidly expanding landscape.