

**FOX
DIRECT
INVESTING
WORKSHOP**

Sept. 13-14, 2022
Virtual Event

The Direct Investing Workshop covers the specialized skills and knowledge needed to have an active and successful direct investing platform for your family. In this workshop, attendees will learn the key steps to direct investing from sourcing deals and due diligence to the best practices in family investment governance.

Sessions will cover the risks of direct investing and the structures and practices families engage in in order to realize the potential for outsized returns. Come learn from experts in the industry and network with your peers in this 2-day workshop.

**WORKSHOP SPONSORED BY
FOX'S PREMIERE DIRECT INVESTING
NETWORK RESOURCE PARTNERS**



Family
Office
Exchange





WORKSHOP SCHEDULE

All times listed are in U.S. Central Time

Workshop begins at 9:00 am and the last session begins at 3:15 pm on both days.

Includes morning, lunch, and afternoon breaks.

WHAT TO EXPECT

- Explore the talent and team structure needed to run a direct investing program
- Learn how to conduct due diligence and avoid common pitfalls in evaluating deals
- Review the key steps in direct investing transactions
- Learn how to develop your network to source deals
- Understand how to build a diligence mosaic

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at familyoffice.com/DIW22 or contact your relationship manager. For questions, please contact us at events@familyoffice.com.

Registration deadline is September 6, 2022.

	FOX MEMBER	NON-MEMBERS
FIRST PAID ATTENDEE	\$2,900	\$3,500
MULTIPLE ATTENDEES	\$2,600	\$3,150

WHO SHOULD ATTEND

Family office emerging CIOs, principals, and wealth iterators should consider attending this workshop. The workshop is geared toward people that have intermediate financial literacy and analysis and want to learn more. This event is beneficial for those who may be taking over a family office and international attendees who want to network with like-minded US-based attendees.

VIRTUAL WORKSHOP AGENDA OVERVIEW

All times listed are in U.S. Central Time

TUESDAY, SEPT 13

- 9:00 AM Welcome to the Workshop
- 9:30 AM An Overview of Direct Investing
- 10:00 AM Investment Policy Statements: Importance, Elements, and Development
- 11:00 AM Break
- 11:15 AM Why and How: The Direct Investment Process
- 12:45 PM Lunch Break
- 2:00 PM Successful Direct Investing Teams and Supporting Resources
- 3:00 PM Break
- 3:15 PM Direct Investment Deal Sourcing

WEDNESDAY, SEPT 14

- 9:00 AM Welcome to Day 2 and Deal Screening: How to Build Your Own Screen
- 10:30 AM Break
- 10:45 AM The Nuts and Bolts of Due Diligence
- 11:45 AM Building a Diligence Mosaic
- 12:45 PM Lunch Break
- 1:45 PM The Direct Investment Transaction: What To Look For
- 3:15 PM Closing Comments and Attendee Q&A