

FOX DIRECT INVESTING WORKSHOP

Sept. 13, 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 and family office. During 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 to realize the potential for outsized returns. Attend to learn from experts in the industry and network with your peers.

**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 10:00 am and the last session begins at 3:40 pm.

Includes morning, lunch, and afternoon breaks.

WHAT TO EXPECT

- Create a robust direct investing strategy
- Develop an investment policy statement that factors in risk, tax implications, time horizon, and size of investments
- Understand due diligence and avoid common pitfalls in evaluating deals
- Know where to source the right deals and how to properly screen them
- Create and interpret a due 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	\$595	\$795
MULTIPLE ATTENDEES	\$525	\$725

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

10:00 am – 10:15 am	Welcome and Overview
10:15 am – 11:15 am	Direct Investing Strategy and Investment Policy
11:15 am – 11:30 am	Morning Break
11:30 am – 12:45 pm	Preparing to Invest in Directs
12:45 pm – 1:15 pm	Lunch Break
1:15 pm – 2:15 pm	Deal Sourcing and Screening
2:15 pm – 3:15 pm	Building a Diligence Mosaic
3:15 pm – 3:30 pm	Recap and Success Factors
3:30 pm – 3:40 pm	Afternoon Break
3:40 pm – 4:30 pm	Attendee Networking