

**FOX
ENTERPRISE
FAMILY
SEMINAR**

Sept. 28, 2021

Zürich,
Switzerland

Building a Resilient Enterprise Family

The FOX Enterprise Family Seminar offers a thoughtful approach to organizing the complex dimensions of your enterprise family, once you have grown bigger than an operating business.

We bring you tools, templates, strategies and case studies for building your master plan for a unified family.

ATTENDEE QUOTES

“Be sure to bring other family members as a lot of the value comes from being there together and thinking and talking in real time.”

“The big picture reasons as to why to go through this journey are illuminated. Hearing from other families gives perspective, comfort, and other ideas.”

 Family Office
Exchange®





SEMINAR SCHEDULE

Monday, Sept. 27 (19:30 - Welcome Dinner)

Tuesday, Sept. 28 (8:30 am - 16:45 pm)

WHO SHOULD ATTEND

Ideal for family members, family office executives, and family board members who are seeking to establish a long-term vision for the Enterprise Family in the context of the current social, family, and economic challenges.

LOCATION

Philos & Partners
Claridenstrasse, 25, 8002
Zürich, Switzerland

PRICING

- 2000 € per attendee
- 400 € discount for two or more participants from the same family enterprise.

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at familyoffice.com/EFZ.

CONTACT

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OVERVIEW

This seminar will help you and your family design a long-term plan for your Enterprise Family. You will gain an understanding of the tools needed to implement a vision and a plan for your family's future together.

WHAT TO EXPECT

- Strategies for alignment and building a clear vision for the future of the enterprise.
- A roadmap for integrating goals across the family, the businesses, the foundation, and the family office.
- Tools to organize enterprise goals and allocate family capital.
- Advice on the best governance structure to support the enterprise goals defined.
- An understanding of leadership talents and transition strategies.
- Methods to engage family members to support the enterprise plan.
- Leading trends and challenges affecting global enterprise families, and how they are tackling them to build resilience.
- Family office services and investment trends that families are using to ensure financial security and growth of their portfolios.

FAMILY ENTERPRISE BUILDING BLOCKS





FOX ENTERPRISE FAMILY SEMINAR AGENDA

19:30 pm	Welcome Dinner (Monday, Sept. 27)	11:45 am	Enterprise Family Case Studies and Peer Discussion <i>Miguel López de Silanes, International Market Head, FOX</i> The module will cover several case studies to bring the Family Enterprise concepts to life. <u>Content to be covered:</u> Four case studies detailing how different enterprise families from around the world have implemented the Enterprise Family framework.
8:30 am	Continental Breakfast		
9:00 am	Introduction of Attendees		
9:30 am	Enterprise Family Themes and Challenges <i>Miguel López de Silanes, International Market Head, FOX</i> Overview of the leading trends and challenges affecting Enterprise Families globally, with a focus in Europe, and how these families are tackling these challenges in order to build resilience. <u>Content to be covered:</u> Key trends and challenges around crisis and opportunity management, investments, governance, next generation engagement and education, succession, technology, global tax and transparency, and philanthropy and impact, and how are families tackling these challenges to build resilience.	13:00 pm	Lunch
10:15 am	Enterprise Planning Building Blocks <i>Sara Hamilton, Founder and CEO, FOX</i> The module will focus on FOX´s unique framework for setting the strategic direction for an enterprise family. Key elements of the framework will be described with examples to highlight the best practices our members are using to ensure family alignment and resilience. <u>Content to be covered:</u> Highlight of the key building blocks of the FOX framework, including values vision, purpose and impact, family alignment and engagement, family learning and leadership development, family governance and leadership selection, goals and strategic allocation of capital across the enterprise, and metrics to measure performance.	14:00 pm	Investment Trends and Case Studies <i>Francesco D'Amico, Founder & CEO, Philos & Partners</i> Description of the family office services and investment trends that families are using to ensure financial security and growth of their portfolios. <u>Content to be covered:</u> Family office services and investment trends, with a focus on 4-5 short case studies explaining how families are organizing in this respect.
		15:30 pm	Afternoon Break
		15:45 pm	Current Challenges for Participants and Peer Discussion Participants will have an opportunity to share their current challenges and key questions that are on their minds as they look forward to the next decade, and get feedback from other Enterprise Family members and experienced FOX Staff.
		16:45 pm	Program Wrap Up



FOX ENTERPRISE FAMILY SEMINAR PRESENTERS



Sara Hamilton

Founder and Chief Executive Officer

Sara Hamilton is the Founder and CEO of Family Office Exchange (FOX), a thought leader for 30 years regarding the business of managing the family enterprise and the family's wealth across generations.

A recognized visionary in the private wealth community, Sara provides strategic direction for FOX and leads the development of programs and services supporting wealthy individuals, family office executives, and wealth advisory firms globally. For three years running, she was named as one of the "Top 50 Women in Wealth Management" by Wealth Manager.

Sara is the co-author of *Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times* and serves on the executive education faculty of the University of Chicago Booth School of Business for the "Private Wealth Management" course offered twice a year in Chicago.



Miguel López de Silanes Gómez

Managing Director, Market Leader International

Miguel López de Silanes Gómez is responsible for delivering FOX services to current members, and actively works to expand the network globally. In addition, Miguel is also involved in FOX's efforts around Risk and Opportunity Management and Crisis Management for Enterprise Families and Family Offices, being this one of his areas of focus.

Previous to FOX, Miguel was director of the Family Office for one of Europe's leading real estate families, with specific responsibility for designing and implementing the family's investment strategy and for providing owner education to the younger family members. He also worked at UBS Wealth Management and UBS Investment Banking in New York, Chile, and other locations in Latin America. He began his career at Bain & Company as an Associate Consultant in London and Madrid. He has an M.B.A. from Harvard Business School and a B.A. in Economics from Universidad Pontificia Comillas (ICADE) in Madrid.



Francesco D'Amico

Founder and CEO of Philos & Partners Ltd

Mr. D'Amico is advising and taking care of the interests of a number of international families. In 2019 Mr D'Amico has founded Philos & Partners in order to assist his clients in family governance, investment management, and family offices services.

Until 2019, Mr. D'Amico has been deputy CEO, member of the Executive Committee, and responsible for all client matters and the development of Quilvest Switzerland (QVS), a family owned international multi-family office. Mr. D'Amico sits on various boards of family offices and foundations, primarily advising on family governance and family office matters. Prior to joining QVS, Mr. D'Amico was the CEO of Unicredit Private Wealth Advisory, the multi-family office of Unicredit Group. He also headed the Private Banking Marketing Unit of Unicredit-HVB Group (UCI).

Mr. D'Amico joined UCI after 10 years of experience in the Wealth Management industry in Switzerland, as a management consultant and as a banker.