

# FOX Family Forum

October 27-29, 2020



Overview

Presenters

Tuesday, Oct. 27

Wednesday, Oct. 28

Thursday, Oct. 29

Registration

## Overview

If 2020 has taught us anything, it's that procrastination is a luxury we can no longer afford. Unlike the 2008 financial crisis, the risks 2020 has laid bare are proving more significant. In response, we are taking this opportunity to look forward. What are the changes we need to make to ensure family engagement, commitment, and financial stability?

At the **2020 FOX Family Forum**, family members, office executives, and their trusted advisors will hear how other families have built plans to achieve positive change and successfully transition to future generations. You'll come away with ideas, tools, and frameworks to help you map out next steps on the road to being a positive and productive enterprise for the long term.

## Who Should Attend

**There is no limit on attendance** per member firm at this year's virtual forum.

All FOX Members, including family members, family office executives and advisors, are encouraged to experience this year's virtual forum.

## Agenda at a Glance (Listed in U.S. Central Time)

### Tuesday, Oct. 27

*Reserved for families, single family offices, and the FOX Thought Leaders Council*

- 10:00 am FOX Membership Update
- 10:20 am Building Trust and Consensus in the Family
- 11:15 am Break
- 11:25 am Breakout Sessions
  - Family Office Value, Cost, and Complexity Factors
  - Building a Diverse Team
  - The Rising Generations' Relationship With Money
- 12:15 pm Day 1 Concludes

### Wednesday, Oct. 28

*Open to all FOX Members*

- 10:00 am FOX Industry Trends
- 10:20 am Rebuilding Economies
- 11:20 am Break
- 11:30 am Breakout Sessions
  - Building a Strategic View of the Family's Future
  - The World in 2050: Water, Food, and Clean Tech
  - The Taxable Investor's Manifesto: Insights into a Quiet Revolution
- 12:20 pm Break
- 1:15 pm Families, Philanthropy, and Impact
- 2:05 pm Break
- 2:15 pm Peer Dialogues: Family Members, Executives, and Advisors
- 3:00 pm Day 2 Concludes

### Thursday, Oct. 29

*Open to all FOX Members*

- 10:00 am Looking Forward, Not Backward
- 10:20 am From Jedi to Yoda - Preparing for Leadership Succession
- 11:10 am Break
- 11:20 am Breakout Sessions
  - 5 Key Principles to Strengthen Family Commitment
  - Turbocharging Your Family Council
  - Family Office Talent and Technology Solutions
- 12:10 pm Break
- 1:10 pm Key Takeaways from the FOX Rising Gen Forum
- 2:00 pm Break
- 2:15 pm Peer Dialogues: Topic Discussions
- 3:00 pm Day 3 Concludes













## Forum Sponsors










|          |            |                  |                    |                   |              |
|----------|------------|------------------|--------------------|-------------------|--------------|
| Overview | Presenters | Tuesday, Oct. 27 | Wednesday, Oct. 28 | Thursday, Oct. 29 | Registration |
|----------|------------|------------------|--------------------|-------------------|--------------|

## Guest Presenters

|  |   |  |  |
|--|---|--|--|
|  <p><b>Peter Begalla</b><br/>         Founder and Owner, JPB Consulting Group; Education and Conference Director, <i>Family Business Magazine</i></p> |  <p><b>Nathan Dungan</b><br/>         Founder and President, Share Save Spend®</p>                         |  <p><b>Stuart Lucas</b><br/>         Co-Managing Partner and Chief Investment Officer, Wealth Strategist Partners</p> |  <p><b>Nadia Roumani</b><br/>         Co-Founder and Senior Designer, Designing for Social Systems (DSS) Program, d.school, Stanford University</p> |
|  <p><b>Ivo Daalder</b><br/>         President, Chicago Council on Global Affairs</p>  |  <p><b>Maarten de Groot</b><br/>         Chief Executive Officer, Eligius BV</p>                           |  <p><b>Scott Peppet</b><br/>         President, Chai Trust Company</p>  |  <p><b>Wendy Steele</b><br/>         Founder and Chief Executive Officer, Impact 100 Global Advisory Council</p>                                    |
|  <p><b>John Dionne</b><br/>         Senior Lecturer, Harvard Business School; Senior Advisor, The Blackstone Group</p>                                |  <p><b>Ivan Lansberg</b><br/>         Co-Founder and Senior Partner, Lansberg-Gersick &amp; Associates</p> |  <p><b>Vincent Robinson</b><br/>         Founder, The 360 Group</p>   |  <p><b>Jeff Strese</b><br/>         Adjunct Professor, Cox School of Business Executive Education, Southern Methodist University</p>                |

## FOX Presenters

|   |  |   |  |
|---|--|---|--|
|  <p><b>Heather Asher Abramson</b><br/>         Director, Relationship Manager</p>              |  <p><b>Sara Hamilton</b><br/>         Founder and Chief Executive Officer</p>     |  <p><b>Bill Sullivan</b><br/>         President</p>                                    |  <p><b>Scott Winget</b><br/>         Market Leader, Enterprise Families</p> |
|  <p><b>Mindy Kalinowski Earley, CMP, CFBA</b><br/>         Chief Learning Officer</p>          |  <p><b>Glen W. Johnson</b><br/>         Chief Operating Officer</p>               |  <p><b>David Toth</b><br/>         Market Leader, Multifamily Offices</p>              |  |
|  <p><b>Miguel López de Silanes Gómez</b><br/>         Market Leader, International Members</p> |  <p><b>Kent Lawson</b><br/>         Director, Technology Integration Services</p> |  <p><b>Jonathan Tunner</b><br/>         Director, Private Investment Opportunities</p> |  |



Overview

Presenters

Tuesday, Oct. 27

Wednesday, Oct. 28

Thursday, Oct. 29

Registration

## Tuesday, October 27 *Reserved for families, single family offices, and the FOX Thought Leaders Council*

### 10:00 am FOX Membership Update

**Glen W. Johnson**, COO, FOX

### 10:20 am Building Trust and Consensus in the Family

**Jeff Strese**, Adjunct Professor, Cox School of Business Executive Education, Southern Methodist University

**Mindy Kalinowski Earley, CMP, CFBA**, CLO, FOX

This year's dramatic events have shifted the tone of conversations in many families, surfacing differing philosophical views and diverse risk-taking appetites. Join the discussion on how families can build trust across divides and strengthen relationships across the family. We'll outline consensus-building steps and give you group exercise ideas to help your family develop a pathway toward agreement on important topics. It takes some effort, but the payoff of a shared vision for the family's future is worth it.

### 11:15 am Break

### 11:25 am Breakout Sessions

Please select one of the following sessions to learn with like-minded peers.

#### Family Office Value, Cost, and Complexity Factors

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

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

You know your office provides tremendous value, but do you know how to explain it to your clients? Our new FOX proprietary study will help you more meaningfully articulate the office's value by aligning it with what your family leaders value. We'll discuss how to message around your costs and complexity factors in relation to delivering services. And we'll share the data we've collected about the average time allocated to key services by office type, and how fees are typically charged by office type.

### Building a Diverse Team

**Vincent Robinson**, Founder, The 360 Group

Across the country, organizations are seeking to be more thoughtful about how they approach the communities they serve and take steps to embed equity into their work. We'll share examples of trailblazing leaders who have successfully integrated a more diverse workforce, as well as pitfalls to avoid if you want more diversity, equity, and inclusion within your teams.

### The Rising Generations' Relationship With Money

**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 teens and young adults can think positively and proactively about their finances and their future—including bringing values into the equation when making decisions about money.

### 12:30 pm Day 1 Concludes



Overview

Presenters

Tuesday, Oct. 27

Wednesday, Oct. 28

Thursday, Oct. 29

Registration

## Wednesday, October 28 *Open to All Members*

### 10:00 am FOX Industry Trends

**Bill Sullivan**, President, FOX

### 10:20 am Rebuilding Economies

**Ivo Daalder**, President, Chicago Council on Global Affairs

**John Dionne**, Senior Lecturer, Harvard Business School; Senior Advisor, The Blackstone Group

**Miguel López de Silanes Gómez**, Market Leader, International Members, FOX

**Bill Sullivan**, President, FOX

What will it take to rebuild our global economies? And how will we generate the stimulus needed for growth? We'll discuss the macro-economic factors shaping the challenges ahead – including the current geopolitical environment and major disruptions changing industry opportunities. And with the U.S. presidential election a week away, we'll engage in a timely discussion about America's place in the world and how its economic bedrock of stability may slip in the decade ahead.

### 11:20 am Break

### 11:30 am Breakout Sessions

Please select one of the following sessions to learn with like-minded peers.

#### Building a Strategic View of the Family's Future

**Scott Peppet**, President, Chai Trust Company

**Glen W. Johnson**, COO, FOX

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

When families with a multi-generational mindset undertake strategic planning, it's with a view that is longer than the typical three- to five-year time horizon of ordinary businesses. For some families, a 25- to 50-, or even

a 100-year time horizon is where they're looking. We'll discuss how this helps family offices develop a resilient enterprise that can weather crises and economic turbulence, and anticipate generational shifts.

#### The World in 2050: Water, Food and Clean Tech

**Jonathan Tunner**, Director, Private Investment Opportunities, FOX

**Miguel López de Silanes Gómez**, Market Leader, International Members, FOX

Looking for direct investment opportunities in the new economy? Here's a hint – invest with an eye toward the year 2050. Our panel will look beyond the short-term effects of Covid-19, and instead discuss potential future top drivers of wealth creation – primarily sustainability and impact. Hear our thoughts on water, food, and "clean tech" and whether they're the areas of massive opportunity that will transcend Covid-19.

#### The Taxable Investor's Manifesto: Insights into a Quiet Revolution

**Stuart Lucas**, Co-Managing Partner and CIO, Wealth Strategist Partners

When designing investment strategy, most academics and some investment advisors consider taxes an afterthought. Author Stuart Lucas will show you how to extract value at the intersections of investing, estate planning, and tax – a skill set that may grow considerably more valuable after the November election. Stuart will demonstrate an approach to maximize profits from the money you earn, the investments you make, and the taxes you pay. Following his guidance, what you consider a good investment of time and dollars will change and your portfolio could grow considerably.

### 12:20 pm Break

*continued on next page...*



Overview

Presenters

Tuesday, Oct. 27

Wednesday, Oct. 28

Thursday, Oct. 29

Registration

## Wednesday, October 28 *continued*

### 1:15 pm Families, Philanthropy, and Impact

**Wendy Steele**, Founder and CEO, Impact 100 Global Advisory Council

**Nadia Roumani**, Co-Founder and Senior Designer, Designing for Social Systems (DSS) Program, d.school, Stanford University

**Glen W. Johnson**, COO, FOX

Philanthropy and social impact commitments don't just benefit the intended parties. Uncovering hidden talents and resources while building collaborative, creative learning communities committed to change pays dividends to your family or organization as well. It doesn't matter if you build a framework of individuals creating "an unstoppable force for good" in their communities, or cultivate a new generation of philanthropic leaders passionate about making a transformational difference. This panel will discuss how giving back can pay it forward for your family or office.

### 2:05 pm Break

### 2:15 pm Peer Dialogues: Family Members, Executives, and Advisors

This time to network will allow you to connect with other FOX members like you. Choose the peer group that best matches your situation.

#### Family Member Dialogues

(Open to family members)

- Gen 1 & 2
- Gen 3 & 4
- Gen 5+

#### Office Executive Dialogues

(Open to single family office executives)

- Small Family Offices 1-6 employees
- Medium Family Offices 7-14 employees
- Large Family Offices 15+ employees

#### Advisor Dialogue

(Open to all advisors)

### 3:00 pm Day 2 Concludes

Overview

Presenters

Tuesday, Oct. 27

Wednesday, Oct. 28

Thursday, Oct. 29

Registration

## Thursday, October 29 *Open to All Members*

### 10:00 am Looking Forward, Not Backward

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

### 10:20 am From Jedi to Yoda - Preparing for Leadership Succession

**Ivan Lansberg**, Co-Founder and Senior Partner, Lansberg-Gersick & Associates

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

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

Greater levels of uncertainty are facing families around the world. Which makes the topic of leadership success more critical to thoughtfully plan and execute against. We'll discuss five critical themes related to succession with author Ivan Lansberg, who will share how important transitions can be smoothly managed. Don't leave your important family transitions to chance.

### 11:10 am Break

### 11:20 am Breakout Sessions

Please select one of the following sessions to learn with like-minded peers.

#### 5 Key Principles to Strengthen Family Commitment

**Miguel López de Silanes Gómez**, Market Leader, International Members, FOX

**Maarten de Groot**, CEO, Eligius BV

Want to know the secret to maintaining family togetherness over generations? A joint FOX and Vrije Universiteit Amsterdam research project has identified five attributes behind family sustainability. We'll share how more than 350 enterprise families across cultures and generations have developed the necessary principles to have lasting family impact.

### Turbocharging Your Family Council

**Peter Begalla**, Founder and Owner, JPB Consulting Group; Education and Conference Director, *Family Business Magazine*

Do you have a Family Council in place but it isn't functioning as planned? Is there a lack of family engagement? Do you just want your Council to operate more effectively? This panel discussion will cover how you can make your Family Council a positive force for good. Learn from families who were able to change the course of their Councils for the better.

### Family Office Talent and Technology Solutions

**David Toth**, Market Leader, Multifamily Offices, FOX

**Kent Lawson**, Director, Technology Integration Services, FOX

The pandemic has thrust our perceptions of the workplace into an entirely new paradigm. If they don't already, your strategic plans for family office talent and technology will look unexpectedly different from just six months ago. We'll discuss the options you need to consider when reshaping who and what will drive the next decade.

### 12:10 pm Break

*continued on next page...*



Overview

Presenters

Tuesday, Oct. 27

Wednesday, Oct. 28

Thursday, Oct. 29

Registration

## Thursday, October 29 *continued*

### 1:10 pm **Key Takeaways from the FOX Rising Gen Forum**

**Mindy Kalinowski Earley, CMP, CFBA**, CLO, FOX

**Heather Asher Abramson**, Director, Relationship Manager, FOX

The rising generation is curious, intelligent, and preparing to step into family governance and business roles. They are your family's future leaders. Rising Gen Network leaders Heather Asher Abramson and Mindy Kalinowski Earley will share key takeaways from FOX's 2020 Rising Gen Forum, including the dominant questions on rising gens' minds. Learn what rising gen want, what interests them, and how they are equipping themselves for the future – so you can better understand how to work with them, serve them, and partner with them.

### 2:00 pm **Break**

### 2:15 pm **Peer Dialogues: Topic Discussions**

Join your peers for small group engagement and discussion on a variety of top-of-mind issues and subjects. Dialogue group topics will be listed on Forum website prior to the program.

### 3:00 pm **Day 3 Concludes**





|          |            |                  |                    |                   |              |
|----------|------------|------------------|--------------------|-------------------|--------------|
| Overview | Presenters | Tuesday, Oct. 27 | Wednesday, Oct. 28 | Thursday, Oct. 29 | Registration |
|----------|------------|------------------|--------------------|-------------------|--------------|

## Registration Questions

**Is this your first time attending the FOX Family Forum?\***  
 Yes  No

**Please select the one that best suits. I am a:\***  
 Family Member  Rising Gen Family Member  
 Family Office Executive  Board/Council Member  
 FOX Thought Leaders Council Member

**If you are a Family Leader/Wealth Owner please select your generation:\***  
 Gen 1  Gen 2  Gen 3  Gen 4  
 Gen 5 or Greater  NA

**What key problem or priority are you trying to solve?**

### TUESDAY, OCTOBER 27

*Open to families, single family offices, and FOX Thought Leaders Council Members*

**Please select your sessions:\***

FOX Membership Update; Building Trust and Consensus in the Family

**Breakout Sessions:** (please select one)\*

Family Office Value, Cost, and Complexity Factors  
 Building a Diverse Team  
 The Rising Generations' Relationship with Money

### WEDNESDAY, OCTOBER 28

*Open to all FOX members*

**Please select your sessions:\***

FOX Industry Trends; Rebuilding Economies  
 Families, Philanthropy, and Impact

**Breakout Sessions:** (please select one)\*

Building a Strategic View of the Family's Future  
 The World in 2050: Water, Food, and Clean Tech  
 The Taxable Investor's Manifesto

**Peer Dialogues:** (please select one)\*

**Family Member Dialogues** (Open to Family members)

Gen 1&2  Gen 3&4  Gen 5+

**Office Executive Dialogues** (Open to Single Family Office Executives)

Small Family Offices  Medium Family Offices  Large Family Offices

**Advisor Dialogue** (Open to all Advisors)

### THURSDAY, OCTOBER 29

*Open to all FOX members*

**Please select your sessions:\***

Looking Forward, Not Backward; Leadership Succession  
 Key Takeaways from the FOX Rising Gen Forum

**Breakout Sessions:** (please select one)\*

5 Key Principles to Strengthen Family Commitment  
 Turbocharging Your Family Council  
 Family Office Talent and Technology Solutions

**Peer Dialogues: Topic Discussions\***

**There is no cost for FOX members to attend the FOX Family Forum. There is no limit on virtual attendance per member.**

If you are not a member of Family Office Exchange, please contact [info@familyoffice.com](mailto:info@familyoffice.com) for membership information.

## Attendee Information

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

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

Name (First/Last)\*

Name of Firm/Family Office\*

Title/Position\*

Street Address\*

City\*

State/Province\*

Country\*

Zip/Postal Code\*

Phone\*

E-mail\*

## How to Register

Advance registration is required. All attendees must register online, or submit this form by October 23, 2020, to participate.

Email: [events@familyoffice.com](mailto:events@familyoffice.com)

Online: [familyoffice.com/FF2020](http://familyoffice.com/FF2020)

Phone: [312.327.1221](tel:312.327.1221)

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



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](http://www.NASBARegistry.org).

**FIELD OF STUDY:** Finance | **Up to 8 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 gain insights and best practices into building and maintaining a successful family enterprise, philanthropy, family office strategies, investment considerations, family learning, and the future of the industry's technology.