FOX Family Office Best Practices Workshop

June 17-19, 2020 | Omni Chicago Hotel | Chicago, IL

FOX Family Office Best Practices Workshop Overview

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As a senior family office professional or family member for an established family office, you may be looking for ways to elevate the services and outcomes offered to the family. This workshop is designed to help you explore best practices employed by the world's leading family offices, and will help you create a strategic mindset to enhance the overall effectiveness and efficiency of your office. With a focus on value-add components to sustaining wealth and family cohesion, you will be able to build a roadmap to accomplish ambitious goals. We begin with strategic planning and goal setting and will explore best practices in family office operations, governance, leadership succession, communication, talent development, and benchmarking.

What to Expect

- Engage in strategic planning for key dimensions of a family office
- Review the value-added financial and non-financial service menu and operating practices provided by a family office
- Create the talent and team structure needed for enhancing the family office
- Develop leadership and succession plans for both the family and family office
- Understand sophisticated governance structures that can better align the family and the family office
- Define best practice goals and measurements of family office performance and opportunities for improvement

Who Should Attend

Ideal for wealth owners and single-family office executives with an established family office who are interested in elevating their knowledge about best practices in leading offices. Attendees may have participated in previous FOX Family Office Design Workshops.

Workshop at a Glance

The workshop will be led by FOX subject matter experts along with other leaders in the family office industry. It provides insights from over 30 years of FOX thought leadership, proprietary research, practical solutions, and showcases select findings from our benchmarking surveys as well as our advisory practice. The program is designed to be interactive, with presentations, case studies, collaborative exercises, and peer exchange opportunities to share experiences.

Wednesday, June 17		Thursday, June 18		Friday, June 19	
12:00 PM	Registration / Lunch	7:30 AM	Breakfast	7:30 AM	Breakfast
1:00 PM	Welcome / Introductions	8:30 AM	**Harnessing Talent and Creating High Value**	8:30 AM	**Measuring Performance of the Family Office**
	The Strategic Family Office	12:00 PM	Networking Luncheon		**Best Practices and the Big Picture**
	Assessing Your Current State	1:00 PM	**Effective Family Office Governance**		**Action Planning**
	Case Studies / Peer Exchange		**Case Studies / Peer Exchange**	11:30 AM	**Informal Discussion with FOX Leaders**
5:00 PM	Meeting Adjourns	5:00 PM	Meeting Adjourns	1:00 PM	Meeting Adjourns
6:00 PM	Cocktail Reception	6:00 PM	Cocktail Reception and Dinner		

TOPICS TO BE COVERED

The Strategic Family Office

Building on an understanding of the best practices used by family offices around the world, we will explore how to define and shape a robust strategy for your family office for today and tomorrow. This includes aligning the purpose of the office with the services delivered and exploring next level goals. We will introduce roles the office can play to better support the family, including acting as a risk manager.

Harnessing Talent in the Office

Who you hire and how you utilize the team in your office—in conjunction with third party advisors—is an important lever critical to enhancing performance. This session examines the shifting roles and responsibilities of staff members, and provides an opportunity to map key family office goals to skills and services. This enables you to nurture office culture, think thoughtfully about compensation and retention of talent, and your team composition.

Creating High Value Services through the Family Office

As families grow and offices become more complex, it is important to understand the mix of services offered and how to deliver what will yield the highest value, in both financial and non-financial services. We will look at the best practices of sophisticated family offices to understand how they provide a customized array of services to their families. These include communication, supporting family transitions, succession planning, leadership, governance, and holistic service offerings. We will also explore how family transitions can provide opportunities to reassess and recalibrate services offered.

Effective Family Office Governance

Sophisticated families often have a robust governance structure to support family decision-making and engagement. This session will highlight effective family office board structures, functions of the board, critical decision-making processes, and key criteria needed for success based on the evolution of the family. The intersection between family and family office governance will be examined, and we will explore how to craft clear mission statements based on guiding principles.

Measuring and Managing Family Office Performance

In a highly interactive session, you will build upon an understanding of critical performance metrics and apply your knowledge to designing the next steps in your family office evolution. Using insights gained from case studies, you will begin to shape your roadmap to a next-level family office using industry best practices.

Best Practices and Seeing the Big Picture for Your Family Office

We often hear wealth owners express the importance of evaluating their family office against best practice. They use these benchmarks as one way to gauge the effectiveness of their office and identify opportunities to optimize the work of the office. We will take a “big picture” view to discuss the tradeoffs and cost/benefit of becoming a best practice office. You will also have a chance to identify those areas where your office has the most opportunity.

FOX Family Office Best Practices Workshop Presenters

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Charles B. Grace, III

Managing Director, Family Office Exchange

Charles B. Grace, III is a Managing Director at Family Office Exchange (FOX) and based in New York City. He works primarily on Advisory Group projects at FOX for multi-generational families and family offices covering all aspects of wealth management. Assignments have included strategic planning, generational transitions, family office design and assessment, governance, operations and processes, development of investment programs, advisor due diligence, and best practices. Charlie is also active at FOX with family office and wealth advisor members as well as the firm's thought leadership and original research.

Charlie has been active for 20 years in the family office community advising high net worth families and serving as a resource to family offices. Charlie has been quoted in various publications, including The Wall Street Journal, Financial Times, The New York Times, and presented at many conferences focused on private investors and family offices. Charlie serves as Treasurer and member of the Executive Committee and Investment Committee of the nonprofit Tuttle Fund, Inc. in New York City. He graduated with a J.D. from the Washington College of Law. Charlie received a B.A. and M.A. in history from Bates College and the American University, respectively.

Sara Hamilton

Founder and Chief Executive Officer, Family Office Exchange

Sara Hamilton is the Founder and CEO of Family Office Exchange (FOX). Sara is a recognized visionary and credited with professionalizing the family office industry. Sara founded FOX in 1989 as a peer network for family office executives. Within 10 years, FOX could see that families needed help with their enterprise vision, managing financial transitions, and educating family members on responsible ownership.

Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting family enterprises, family office executives, and wealth advisory firms in more than 20 countries. FOX has built a unique team of professionals serving multigenerational families, led by 15 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, and Madrid.

Glen W. Johnson

Chief Operating Officer, Family Office Exchange

Glen Johnson is Chief Operating Officer at Family Office Exchange (FOX). In this role, he is responsible for all aspects of the member experience, ensuring that each family member, family office executive, and trusted advisor has an unsurpassed experience partnering with FOX by providing unique industry knowledge and insights coupled with a safe and confidential environment where members can share best practices. In addition, Glen oversees the operations of FOX and is charged with establishing and executing systems to execute FOX's strategic plan, promoting it's vision and service-centric culture, and enabling the FOX team to work together to exceed our member's expectations.

Glen has over 30 years of experience working with family offices, business owners, and executives, first as an attorney and then as a wealth advisor, eventually founding Mirador Family Wealth Advisors – the multi-family office for Fifth Third Bank. Glen writes and speaks nationally focusing on family and business governance and the unique challenges faced during the sale and transition of closely held businesses. Glen earned a Bachelor of Sciences degree in Education from the University of Michigan in Ann Arbor, MI and a Juris Doctorate degree from Wayne State University Law School in Detroit, MI.

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.

FIELD OF STUDY **Finance** | Up to **14.5 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.

PROGRAM LEVEL **Overview** | **No prerequisites are required for any of the sessions.**

DELIVERY METHOD **Group Live Program**

LEARNING OBJECTIVES Upon completion of this program, participants will gain an understanding of the steps required when undertaking family office strategic planning and goal setting, best practices in family office governance, leadership succession, communication, talent development, and benchmarking.

FOX Enterprise Family Workshop

June 15-17, 2020
Omni Chicago Hotel | Chicago, IL

This workshop 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. Attendees will learn how to develop a custom framework for their own family, a process for outlining critical action steps, and the key questions every Enterprise must consider.

Ideal for family members, family office executives, and family board members who are seeking to establish a long-term vision for the Enterprise Family.

www.familyoffice.com/ENTERPRISE20

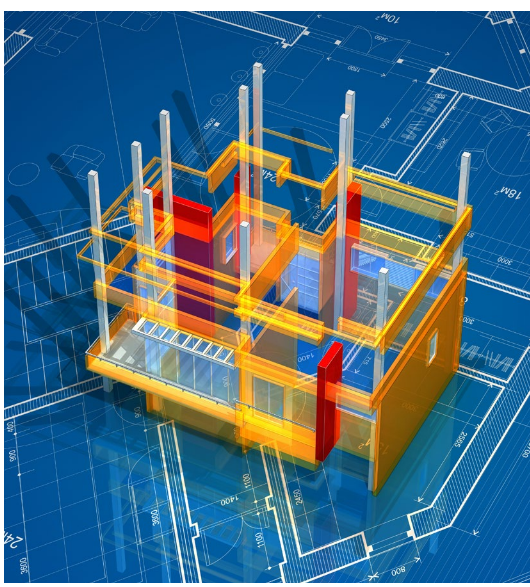
FOX Rising Gen Leadership Program

June 26-27, 2020
Convene Conference Center | Chicago, IL

The Rising Gen Leadership Program Series is for the preparation of future family leaders. The multi-part learning series is focused on educating future family leaders so they are armed with the skills needed to thrive in life, business, and wealth stewardship. Participants will attend educational sessions and engage in peer networking and experiential activities.

Participants in the program will obtain knowledge as they pursue their careers and increased credibility within the family.

www.familyoffice.com/RGLPJUNE



FOX Family Office Design Workshop

November 18-19, 2020
Convene Conference Center | Chicago, IL

This workshop will cover basic principles of a well-run family office and provide tools and techniques to professionalize the office. Come and learn the basics or get a refresher on how to improve operations and take your office or the one you are planning to the next level.

Ideal for new family office executives, family members considering starting a family office, or individuals looking to improve operations of an early-stage family office.

www.familyoffice.com/FOD20

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THREE WAYS TO REGISTER

1. **Scan and email** to: events@familyoffice.com
2. **Register online** at: www.familyoffice.com/FOBP20
3. **Fax this form** to: 1.312.327.1212

ATTENDEE INFORMATION

Select information will be used for your badge including city and state.

Name (First/Last)

Name of Firm/Family Office

Title/Position

Street Address

City *State/Province*

Country *Zip/Postal Code*

Phone

E-mail

Do you have any dietary or special needs?

REGISTRATION OPTIONS - PLEASE SELECT BELOW

	FOX MEMBER	NON-MEMBERS
FIRST PAID ATTENDEE	☐ $3,775	☐ $4,500
ADDITIONAL PAID ATTENDEES	☐ $3,400	☐ $4,000

FOX FAMILY OFFICE BEST PRACTICES WORKSHOP

June 17-19, 2020

PAYMENT METHOD

❍ **Payment by check is enclosed.** *(Check payable in U.S. dollars to Family Office Exchange)*
Family Office Exchange ATTN: Events
100 South Wacker Drive, Suite 800, Chicago, IL 60606

❍ **To pay by credit card** please call the Events Team directly at 1.312.327.1221 and provide credit card details or register online at www.familyoffice.com/FOBP20

Note: credit card payments over $7,500.00 are subject to a 3.5% fee on the entire payment.

For event registrations, refunds of payment or forum allotments will be offered if the cancellation is made in writing to Family Office Exchange at events@familyoffice.com five (5) or more business days prior to the start of the event. For more information regarding complaints or administrative policies please call 312-327-1200.

LOCATION AND ACCOMMODATIONS

Omni Chicago Hotel
676 Michigan Ave. | Chicago, IL 60611
www.omnihotels.com/hotels/chicago

FOX has reserved a limited number of rooms at the Omni Chicago Hotel at a rate of $329 per night plus applicable taxes. To obtain this discounted rate, please call at 1-800-THE-OMNI (1-800-843-6664) and mention the FOX Workshop Series. You may also book rooms online by visiting the FOX website at www.familyoffice.com/FOBP20.

Attendees are responsible for making their own accommodation arrangements. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is **Wednesday, May 20**.

REGISTRATION QUESTIONS

Please identify your role:
❍ I am a family member ❍ I am a family office executive

What year was your family office founded?

How many staff (full-time equivalent) are employed by the family office?

How do you identify your role(s) in the family/family office?
(Mark all that apply)

❍ Business Leader ❍ Rising Gen Leader
❍ Family Leader ❍ Family Office Executive
❍ Board Chairperson ❍ Philanthropic Director
❍ Board Member ❍ Advisor to Family
❍ Trustee ❍ Other

Which generation provides family leadership today? (Circle one)
G1 G2 G3 G4 G5 G6 G7 G8

Which generation are you? (Circle one)
G1 G2 G3 G4 G5 G6 G7 G8 NA (if FO Exec.)

What do you hope to learn from this workshop?

Which of these topics are most important to you in your situation?
(Please rank each option below 1-5, 1 being the most important and 5 being the least.)

____Family Office Strategy and Goals ____Talent and Team Structure
____Value-Added Services ____Family Office Governance
____Performance Management

Do you plan to attend the cocktail reception on Wednesday, June 17?
❍ Yes ❍ No

Do you plan to attend the following on Thursday, June 18?
❍ Breakfast ❍ Lunch ❍ Cocktails and Dinner

Do you plan to attend the following on Friday, June 19?
❍ Breakfast

This program involves pre-work which must be completed in advance. Participants should expect to receive an email with instructions and plan to complete the materials well before arriving.