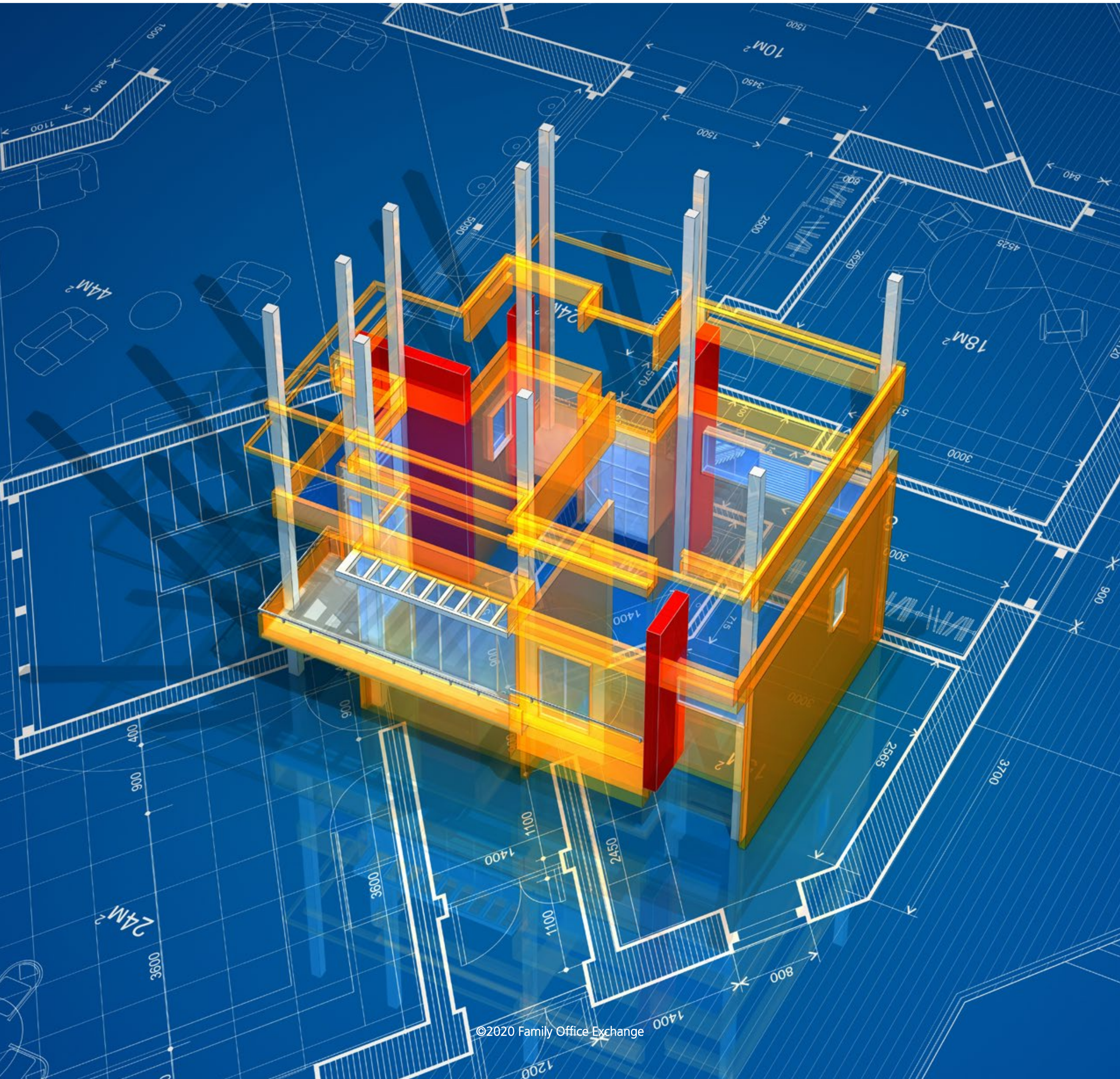
NEW DATES

FOX Family Office Design Workshop

September 9-10, 2020 | Convene Conference Center | Chicago, IL



FOX Family Office Design Workshop Overview

September 9-10, 2020 | Convene Conference Center | Chicago, IL

The FOX Family Office Design 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. With nearly 30 years of collective intelligence, FOX will share best practices regarding what steps to take, when to take them, and how to avoid costly mistakes and setbacks.

What to Expect

- Understand the critical dimensions of a family office
- Review the range of services that can be provided by a family office
- Explore the talent and team structure needed to run an office
- Gain insights into operational challenges and technology solutions
- Learn about the cost and complexity of the office and total wealth management
- Identify methods for oversight of the family office and measuring performance of the office

Who Should Attend

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.

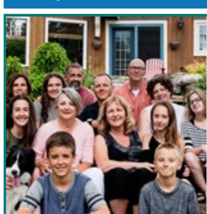
Workshop at a Glance

The workshop includes FOX proprietary concepts, practical solutions, and incorporates new data from our recent family office benchmarking survey. The program will be interactive, including presentations, case studies, discussion, and networking with your peers to share experiences.

Wednesday, September 9	
8:00 AM	Breakfast
9:00 AM	**Overview and Services**
12:00 PM	Lunch
1:00 PM	**Talent and Technology**
4:30 PM	Meeting Adjourns
6:00 PM	Cocktails and Dinner

Thursday, September 10	
7:30 AM	Breakfast
8:30 AM	**Cost and Governance**
10:30 AM	**Successful Client Engagement**
12:00 PM	Lunch
1:00 PM	**Measures of Success and Best Practices**
3:00 PM	Meeting Adjourns

Explore Other FOX Workshops



FOX Enterprise Family Workshop

November 16-17, 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 Family Office Best Practices Workshop

November 18-19, 2020

Omni Chicago Hotel | Chicago, IL

This workshop is designed to help explore best practices employed by some of the world's leading family offices. The sessions will focus on creating a strategy to not only enhance the overall effectiveness and efficiency of your office, but to also build a roadmap to accomplish it. We begin with strategic planning and goal setting and will explore best practices in governance, leadership succession, communication, talent development, and benchmarking.

Ideal for wealth owners and single-family office executives with an established family office who are interested in elevating their efficiency and effectiveness. **www.familyoffice.com/FOBP20**

FOX Family Office Design Workshop Agenda

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Wednesday, September 9

MODULE 1

Overview of the Family Office and Structures

Defines and introduces building blocks and sophisticated concepts behind family offices including reasons to form and maintain an office, various types, evolution, functions and purpose, and other attributes of offices. The office's central role as risk manager and other roles are introduced.

MODULE 2

Scope of Integrated Services and Method of Service Delivery

Sets forth the universe of services provided by family offices and how they are delivered in a customized and integrated manner to meet the technical requirements of managing a family's wealth and enhance family meetings, educate the next generation, among other benefits.

MODULE 3

Talent and Team Structure

Introduces the notion that the integrity of the family office staff has the greatest impact on the office's success. This session examines the roles and responsibilities of staff members, organizational structures, mapping of key skills to services, coordination and oversight of third-party advisors, and compensation.

MODULE 4

Technology and Data Security

The family office is the primary source of consolidated financial information. This session addresses the integration challenge inherent in consolidating data from multiple sources.

Thursday, September 10

MODULE 5

Costs of the Family Office and Total Wealth Management

Family offices have a wide range of costs and the important relationship between cost, breadth of service, and complexity will be explored. Total cost of wealth management will also be examined.

MODULE 6

Family Office Governance

Provides an understanding of family office board structures and functions as well as decision-making processes in family offices, with reference to mission, leadership, and succession. Benefits of governance and appropriate degrees of formality are addressed.

MODULE 7

Measures of Success in the Family Office and Best Practices

With an exploration of best practices, this interactive session is designed to clarify your next steps in the family office design process and explore ways to help you measure success.

FOX Family Office Design Workshop Presenters

September 9-10, 2020 | Convene Conference Center | Chicago, IL

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. 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.

Gaby Griffin

Market Leader, Business Owners and Family Office Executives, Family Office Exchange

Gaby Griffin is the Market Leader for Business Owners and Family Office Executives at FOX. In her role, Gaby leads the overall Family Office Council experience and manages multiple councils. She provides members the opportunities to learn from and share ideas with highly accomplished and hard-to-find peers in a confidential environment. Gaby serves as a member of the FOX leadership team, and brings 25 years of wealth management, corporate banking, investment, and strategic advisory experience to FOX and its members. Gaby recently joined FOX from Capital Group, and previously held leadership positions at LaSalle Bank NA and Abbot Downing. Gaby earned a B.A. in Political Science from the University of Wisconsin at Madison and obtained a Certified Private Wealth Advisor (CPWA®) designation at the University of Chicago Booth School of Business in 2013.

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. 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 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 **13 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, and mistakes to avoid, when developing an effective family office. Additional program objectives include: insights regarding oversight of the family office, services scope and delivery, costs of the family office, talent and team structure, technology and data security, performance metrics and best practices, and family office planning steps.

FOX Family Office Design Workshop Registration

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THREE WAYS TO REGISTER

1. **Scan and email** to: events@familyoffice.com
2. **Register online** at: www.familyoffice.com/FOD20
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	**FOX FAMILY OFFICE DESIGN WORKSHOP**
ADDITIONAL PAID ATTENDEES	☐ $3,400	☐ $4,000	**September 9-10, 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/FOD20

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

Convene Conference Center
311 West Monroe Street
Chicago, IL 60606

REGISTRATION QUESTIONS

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

Do you have a formal family office?
❍ Yes, I have a formal family office ❍ No, I do not have a formal family office

If you have a formal family office, what year was it established?

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

❍ Business Leader
❍ Family Leader
❍ Board Chairperson
❍ Board Member
❍ Trustee
❍ Rising Gen Leader
❍ Family Office Executive
❍ Philanthropic Director
❍ Advisor to Family
❍ 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 1-7, 1 being the most important and 7 being the least.)

____Overview of the Family Office and Structures
____Scope of Integrated Services and Method of Service Delivery
____Talent and Team Structure
____Technology and Data Security
____Costs of the Family Office and Total Wealth Management
____Family Office Governance
____Measures of Success in the Family Office and Best Practices

Do you plan to attend cocktails and dinner on Wednesday, September 9?
❍ Yes ❍ No