FOX CANADIAN FAMILY OFFICE DESIGN WORKSHOP

October
4-5, 2021
Virtual Event

The FOX Canadian Family Office Design Workshop covers basic principles of a well-run family office and provides 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 over 30 years of collective intelligence, FOX experts will share best practices regarding what steps to take, when to take them, and how to avoid costly mistakes and setbacks. This Workshop will address the nuances that impact Canadian Family Offices throughout the two-day meeting.

"This workshop provides a great overview and understanding of what a family office is and how other family offices practice and the challenges/focuses they have."

- 2020 U.S. Workshop Attendee

Family Office Exchange®

WORKSHOP SCHEDULE

All times listed are in U.S. Central Time

10:00 am - 4:00 pm on both days.
Includes morning, lunch, and afternoon breaks.

WHAT TO EXPECT

- Understand the critical dimensions of a family office
- Review the range of services that a family office may provide
- 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 the performance of the office

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at **familyoffice.com/FODCA** or contact your relationship manager. For questions, please contact us at **events@familyoffice.com**.

WORKSHOP AT A GLANCE

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

WHO SHOULD ATTEND

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

WORKSHOP AGENDA OVERVIEW

MONDAY, OCTOBER 4

10:00 AM	Introductions and Expectations
10:50 AM	Break
11:00 AM	Family Office Goals and Roles
11:50 AM	Q & A
12:00 PM	Mid-day Break
2:00 PM	Scope of Services and Service Delivery
2:50 PM	Break
3:00 PM	Organization and Team Structure
3:50 PM	Q & A
4:00 PM	Day 1 Concludes

TUESDAY, OCTOBER 5

10:00 AM	Technology to Support the Family Office
10:50 AM	Break
11:00 AM	Complexity and Cost of the Family Office
11:50 AM	Q & A
12:00 PM	Mid-day Break
2:00 PM	Ownership and Governance
2:50 PM	Break
3:00 PM	Case Studies and Action Steps
3:50 PM	Final Questions and Wrap-up
4:00 PM	Workshop Concludes

WORKSHOP AGENDA

MONDAY, OCTOBER 4

10:00 am **Introductions and Expectations**

10:50 am **Break**

11:00 am **Family Office Goals and Roles**
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 a risk manager and different roles are introduced.

11:50 am **Q & A**

12:00 pm **Mid-day Break**

2:00 pm **Scope of Services and Service Delivery**
Sets forth the universe of services provided by family offices and how they are delivered in a customized and integrated manner. Covers how family offices can meet the technical requirements of managing a family's wealth, enhancing family meetings, and educating the next generation, among other benefits.

2:50 pm **Break**

3:00 pm **Organization and Team Structure**
Introduces the notion that the integrity of the family office staff has the most significant impact on the office's success. This session examines the roles and responsibilities of staff members, organizational structures, mapping of critical skills to services, coordination and oversight of third-party advisors, and compensation.

3:50 pm **Q & A**

4:00 pm **Day 1 Concludes**

TUESDAY, OCTOBER 5

10:00 am **Technology to Support the Family Office**
The technology of the Family Office directly reflects the family goals, office roles, and scope of services. This session will focus on the architecture of technology that integrates the core aspects of the office and how the overall hub to technology is the family itself.

10:50 am **Break**

11:00 am **Complexity and Cost of the Family Office**
Family offices have a wide range of costs, and the vital relationship between cost, breadth of service, and complexity will be explored. The total cost of wealth management will also be examined.

11:50 am **Q&A**

12:00 pm **Mid-day Break**

2:00 pm **Ownership and Governance**
This session explains family office board structures and functions and decision-making processes in family offices regarding mission, leadership, and succession. Benefits of governance and appropriate degrees of formality are addressed. Managing conflicts of interest (actual and perceived) where individuals wear multiple hats within the family office will be discussed.

2:50 pm **Break**

3:00 pm **Case Studies and Action Steps**
Learn from real-life examples of families like yours that have built their own family office, why they succeeded, and where they struggled.

3:50 pm **Final Questions and Wrap-up**

4:00 pm **Workshop Concludes**

WORKSHOP PRESENTERS

Ed Giacomelli

Market Leader,
Canada

Ed Giacomelli is based in Toronto and is the Market Leader for Canada at FOX. In his role, Ed works with various Councils, where members can share experiences, ideas and best practices with peers in a confidential environment.

Serving families and operating companies as a trusted advisor for over 25 years in the areas of strategy, family office, capital markets, governance and succession, Ed brings significant experience to FOX and its Canadian members. Most recently, Ed was CEO of Pelmorex Investments Inc. (“PII”), the Morrissette family enterprise, where he continues in his role as an advisor to, and director of, PII and its core operating company. Prior to PII, he had a successful career as a senior investment banker advising Canadian and international clients on strategic matters.

Ed has also held the positions of senior partner and Managing Director of Crosbie & Company; Head of the Toronto office of Rothschild & Co, the family-controlled Global Advisory firm; and Managing Director of CIBC World Markets. Ed is active in the Toronto community as a member of the President’s Council of St. Michael’s Hospital Foundation since its inception in 2008, and as a past director of Prostate Cancer Canada until its merger with Canadian Cancer Society. Ed earned an HBA and MBA from the Ivey Business School, Western University.

Scott Winget

Market Leader,
Enterprise Families

Scott Winget is the Enterprise Market Leader at FOX. In his role, Scott serves as Co-Chair for Enterprise Councils and Executive Councils, where members can share experiences, ideas, and best practices with veteran peers in a confidential environment. Scott also serves as relationship manager for Enterprise Family members, in order to understand their unique needs and provide them with access to important research and objective guidance.

Scott is as a member of the FOX leadership team, helping to develop and execute service strategies designed to meet the needs of his market segment, and also participates in new research and thought leadership meaningful to members.

Scott is a CPA and holds a J.D. from The Ohio State University, where he also earned a B.S. in Business Administration with a dual major in Accounting and Finance. He is a member of the Rocky Mountain Estate Planning Council, Colorado Society of CPAs and the Colorado Bar Association. He has also held several securities and insurance licenses and served on the board of the Mountain Area Land Trust as Treasurer and head of the Finance Committee among other roles with non-profits.

Kent Lawson

Director, Technology
Integration Services

Kent Lawson is Director of Technology Integration Services at FOX. With 25 years of experience as a leader in the wealth management industry, and a deep focus in technology for the family office, Kent’s expertise in consulting, project management, analysis, and diligence around technology drives the FOX Technology Marketplace.

Through his previous role with an enterprise family office and as a contributor to FOX forums, Kent brings over a decade of experience serving at the executive level within a single family office. His expertise in wealth management spans a variety of disciplines, including investment operations, technology, and compliance via working with RIAs, the SEC, and Global Investment Performance Standards (GIPS). He also served as a business analyst and consultant for Advent Software, as COO of a trust company, and other technology solution vendors. Kent also founded an outsource COO firm in the wealth management industry providing strategic leadership as a trusted advisor.

His background in creativity and thinking outside the box provided the foundation needed for designing innovative solutions in business process and technology making him perfectly suited for the family office industry.

WORKSHOP REGISTRATION

HOW TO REGISTER

Advance registration is required. All attendees must register on-line or submit this form by September 27, 2021.

Email: events@familyoffice.com
Online: familyoffice.com/FODCA
Phone: 312.327.1221

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

Reset This Form | Email This Form to Register

REGISTRATION OPTIONS

	FOX MEMBER	NON-MEMBERS
FIRST PAID ATTENDEE	☐ US$2,900	☐ US$3,500
MULTIPLE ATTENDEES	☐ US$2,600	☐ US$3,150

PAYMENT METHOD

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 familyoffice.com.

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

All registrations subject to approval by Family Office Exchange. For event registrations, refunds of payment 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.

ATTENDEE INFORMATION

Name (First/Last)*

Firm/Family Office Name*

Title/Position*

SHIPPING ADDRESS FOR PROGRAM MATERIALS

Street Adress*

City* State/Province*

Country* Zip/Postal Code*

Phone*

E-mail*

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.)

Family Office Goals and Roles
Scope of Services and Service Delivery
Organization and Team Structure
Technology to Support the Family Office
Complexity and Cost of the Family Office
Ownership and Governance
Case Study and Action Steps

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 ☐ 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?* (Check one)

☐G1 ☐G2 ☐G3 ☐G4 ☐G5 ☐G6 ☐G7 ☐G8

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

What do you hope to learn from this workshop?*