

# FOX FAMILY OFFICE DESIGN WORKSHOP

Sept. 29-30, 2021  
Virtual Event

## For Embedded Family Offices

This special version of our FOX Family Office Design Workshop was explicitly created for business-owning families with embedded family offices (i.e., where employees of the business currently provide services for the family).

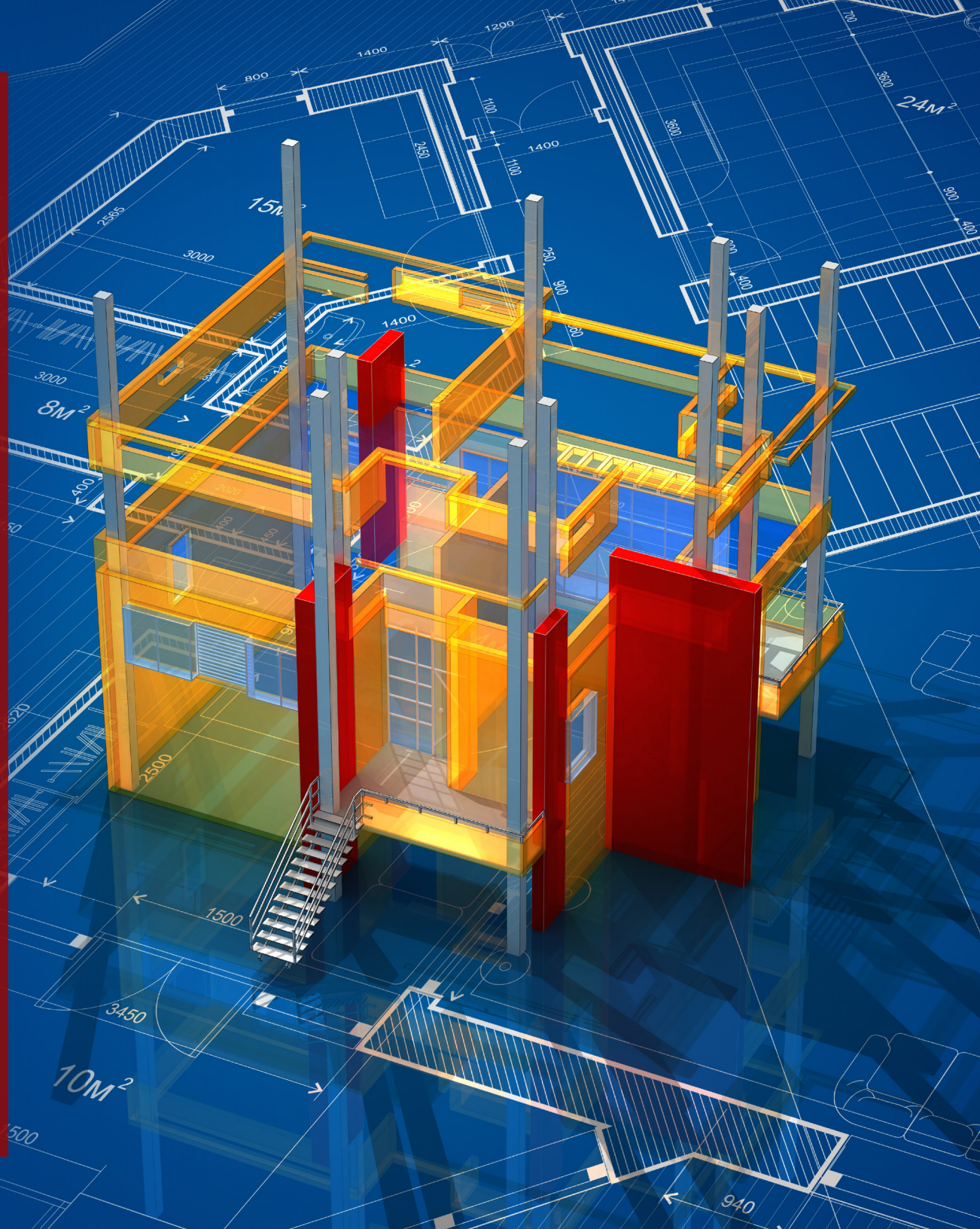
The workshop will address whether it might make sense to separate the office from the business and will review your options, including outsourcing services to a wealth advisor, setting up your own single family office, or somewhere in-between. It covers the basic principles of designing a well-run family office that matches the values and goals of the family.

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*"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 Attendee

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## WHAT TO EXPECT

- Understand the critical dimensions of a family office
- Learn how a family office can support the family business, leverage its resources, and when it may make sense to separate an embedded office from the business
- Explore your options and the pros and cons of multi-family offices and single family offices
- Learn how an office can support the goals of the family
- Review the range of services that a family office can provide
- Explore the talent and team structure needed to run an office
- Review case studies and best practices

## TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at [familyoffice.com/FOD21](https://familyoffice.com/FOD21) or contact your relationship manager. For questions, please contact us at [events@familyoffice.com](mailto:events@familyoffice.com).

## WORKSHOP AT A GLANCE

With over 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.

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 individual experiences.

## WHO SHOULD ATTEND

Ideal for new family office and family business executives, family members considering starting a family office, those are looking to improve operations of an early-stage family office, and others considering separating an embedded office from the business.

## WORKSHOP AGENDA OVERVIEW All times listed are in U.S. Central Time

### WEDNESDAY, SEPT 29

- |          |   |
|----------|---|
| 10:00 AM | Introductions and Expectations  |
|          | Why Separate the Family Office from the Business?   |
|          | Buy or Build? Family Office vs. Other Wealth Management Options                               |
| 12:15 PM | Mid-day Break   |
| 1:15 PM  | What are the Benefits of a Single Family Office?  |
| 2:15 PM  | Q & A   |
| 2:40 PM  | Optional Sessions:<br>How to Choose a Wealth Advisor or MFO<br>Dedicated Single Family Office |
| 3:30 PM  | Day 1 Concludes   |

### THURSDAY, SEPT 30

- |          |  |
|----------|--|
| 10:00 AM | Recap from Day 1   |
|          | Group Discussion   |
|          | Family Office Goals and Roles / Scope of Services and Delivery |
|          | Talent and Team Structure                                      |
| 12:15 PM | Mid-day Break  |
| 1:15 PM  | Case Study and Call to Action                                  |
| 2:15 PM  | Final Questions and Wrap-up                                    |
| 2:30 PM  | Workshop Concludes   |



## WORKSHOP AGENDA

### WEDNESDAY, SEPTEMBER 29

**10:00 am** **Introductions and Expectations**  
Attendees will have a chance to meet each other, learn about their current situation, and discuss what they hope to gain from the workshop.

#### **Why Separate the Family Office from the Business?**

Separating personal from company affairs is an essential best practice for business-owning families, and successfully transitioning requires building a roadmap. Establishing a separate family office dedicated to each family member's unique financial needs is a critical first step in managing assets across generations.

#### **Buy or Build? Family Office vs. Other Wealth Management Options**

After deciding to separate, several options exist, from outsourcing all the services to a multi-family office (MFO) to creating your own dedicated single family office (SFO). We will address the reasons you might choose one option over the other and the pros and cons of each.

**12:15 pm** **Mid-day Break**

#### **1:15 pm** **What are the Benefits of a Single Family Office?**

If you've decided to create your own SFO, we'll discuss how to identify the primary purposes and benefits to support your family and the common types of SFOs that may match your goals.

**2:15 pm** **Q&A**

#### **2:40 pm** **Optional Session #1: How to Choose a Wealth Advisor or MFO**

If you're still considering whether to outsource to an MFO (rather than build your own SFO), there are several types of firms and many choices. Please come to this optional session to find out more.

#### **Optional Session #2: Dedicated Single Family Office**

If your family is committed to creating a Single Family Office? Join us for this insightful session to take a deeper dive into your top concerns at this point in the process.

**3:30 pm** **Day 1 Concludes**

### THURSDAY, SEPTEMBER 30

**10:00 am** **Recap from Day 1**

#### **Group Discussion**

What is on your mind? What have we not covered, or what are you still wondering? What has become clear to you from our conversation yesterday?

#### **Family Office Goals and Roles / Scope of Services and Delivery**

Dig deeper into how the family goals define services for the single-family office (SFO), how these services are integrated and prioritizing needs, as well as the right delivery model for the family.

#### **Talent and Team Structure**

The search for talent in the Family Office space is an expanding universe. This session will discuss how to ensure the office staff and third-party advisors have the right skill sets and are able to function as a cohesive team. Recognizing when you are not on the right path and how to effectively pivot if needed will also be covered, as well as understanding outsourcing considerations.

**12:15 pm** **Mid-day Break**

#### **1:15 pm** **Case Study and Call to Action**

Learn from real-life examples of families like yours that have built their own family office, why they succeeded, and where they struggled.

**2:15 pm** **Final Questions and Wrap-up**

**2:30 pm** **Workshop Concludes**



## WORKSHOP PRESENTERS



### Gaby Griffin

Market Leader, Business Owners  
and Family Office Executives

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. No matter what hat she's wearing, her goal is simple – to create value for families by providing objective guidance and timely relevant information in order to make informed decisions.

Gaby takes a very personalized approach to her relationship management practice and has built client and advisory relationships that span over two decades. She also serves as a member of the FOX leadership team.

Gaby earned a B.A. in Political Science from the University of Wisconsin at Madison. She obtained a Certified Private Wealth Advisor (CPWA®) designation at the University of Chicago Booth School of Business in 2013. Gaby is a member of the Chicago Estate Planning Council (CEPC), Women Investment Professionals, 100 Women in Finance, DyMynd Angels, and Urban Land Institute (ULI). Gaby served on the Board of Trustees for Victory Gardens Theater from 2012-2020. Additionally, she has held several other positions in the non-profit sector.



### 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.



# WORKSHOP REGISTRATION

## HOW TO REGISTER

Advance registration is required. All attendees must register on-line or submit this form by September 20, 2021.

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

Online: [familyoffice.com/FOD21](http://familyoffice.com/FOD21)

Phone: [312.327.1221](tel:312.327.1221)

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

## REGISTRATION OPTIONS

	FOX MEMBER	NON-MEMBERS
FIRST PAID ATTENDEE	<input type="checkbox"/> \$2,900	<input type="checkbox"/> \$3,500
MULTIPLE ATTENDEES	<input type="checkbox"/> \$2,600	<input type="checkbox"/> \$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](mailto: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 Address\*

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.)

- Separation of the Family Office from the Business
- The Family Office vs. Other Wealth Management Options
- The Benefits of a Single Family Office
- How to Choose a Wealth Advisor or MFO?
- Family Office Goals and Roles
- Scope of Services and Delivery
- Talent and Team Structure

## 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)

- |  |  |
|--|--|
| <input type="checkbox"/> Business Leader   | <input type="checkbox"/> Rising Gen Leader       |
| <input type="checkbox"/> Family Leader     | <input type="checkbox"/> Family Office Executive |
| <input type="checkbox"/> Board Chairperson | <input type="checkbox"/> Philanthropic Director  |
| <input type="checkbox"/> Board Member      | <input type="checkbox"/> Advisor to Family       |
| <input type="checkbox"/> Trustee           | <input type="checkbox"/> 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?\*

### Do you plan to attend an optional session?\*

- How to choose a Wealth Advisor or MFO
- Dedicated Single Family Office
- I have not yet decided
- I do not plan to attend