FOX Family Office Forum

Virtual Event | September 21-23, 2020

Overview	Presenters	Monday, Sept. 21	Tuesday, Sept. 22	Wednesday, Sept. 23	Registration

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Overview

Join your family office peers at the **2020 FOX Family Office Forum**™. This year, more than ever, you'll want to take advantage of the chance to learn how other family offices are addressing the swiftly churning talent, technology, and teaming tides.

Our three-day program will bring together CEOs, CFOs, COOs, senior managers, HR managers, technology heads, and family members to discuss topics such as: **your evolving client**, **family office technology**, **sourcing and managing talent**, **what's new in trust and estate planning**, and **building your external advisor team**. We invite you—and every member of your office—to join discussions about the common challenges family office leaders are actively addressing.

Who Should Attend

All FOX Members, including Family Office Executives and Advisors, are encouraged to attend this year's forum. There is no limit on attendance per member firm.

Agenda at a Glance (All Times Central)

Monday, Sept. 21

10:00 am	Welcome and Introductions
10:10 am	Ready or Not - Your Future Family Office is Here
10:20 am	Evolving Client Needs and Expectations Are Changing the Role of the Family Office
10:45 am	Future of Technology in the Family Office
11:30 am	Break
11:45 am	Peer Dialogues
12:30 pm	Day 1 Concludes

Tuesday, Sept. 22

10:00 am	Welcome and Introductions
10:10 am	Spot and Manage Talent in the New Paradigm
11:05 am	Break
11:15 am	Breakout Sessions
12:05 pm	Day 2 Concludes

Wednesday, Sept. 23

10:00 am	Welcome and Introductions
10:10 am	2020 Trust and Estate Update
11:00 am	Break
11:10 am	Delivering Value Through a Trusted Advisor Ecosystem
12:00 pm	Closing Remarks
12:15 pm	Forum Concludes

Forum Sponsor

ADDEPAR

www.addepar.com

Presenters

Cassie Attebury
Principal
Talent Outside the Lines

Ken Cameron
Director
Grant Thornton, LLP

Katherine Dunlevie
Managing Director and
Executive Vice President
The Family Office at Synovus

Mindy Kalinowski Earley, CMP, CFBA
Chief Learning Officer
FOX Family Learning Center
Family Office Exchange

Catherine Garner
Head of Technology
Walton Enterprises

Robert Gray
Assistant Vice President, Enterprise
Operations and Executive Security
Cox Enterprises, Inc.

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

Mark Harder
Partner
Warner Norcross & Judd LLP

Glen W. Johnson
Chief Operating Officer
Family Office Exchange

Neil Kreuzberger
President and Founder
Kreuzberger Associates, LLC

Kent Lawson
Director, Technology Integration Services
Family Office Exchange

Peter Leo
Director, Human Capital
Family Office Exchange

Rob Mallernee
Chief Executive Officer,
Chief Compliance Officer
Eton Advisors

Arden O'Connor
CEO
O'Connor Professional Group

Karen Rush
Managing Director, Membership
Family Office Exchange

Jamie Sanders
Partner
Tax, Private Client Services, RSM

Bill Sullivan
President
Family Office Exchange

David Toth
Managing Director
Family Office Exchange

Jonathan Tunner
Director, Private Investment Opportunities
Family Office Exchange

Scott Winget
Market Leader, Enterprise Families Family
Office Exchange

Kyle Yost
Finance Manager
Rock Ventures LLC

Monday, September 21

10:00 am
Welcome and Introductions

Glen W. Johnson, Chief Operating Officer, Family Office Exchange

10:10 am
Ready or Not - Your Future Family Office is Here

Bill Sullivan, President, Family Office Exchange

The evolution of family priorities and the acceleration of technological advances are reshaping the future of the Family Office. We will share insights into the Future of the Family office across four pillars of change: Shifts in Family Priorities, Proliferation of Technology, Evolution of Talent Profile, and Rising Importance of Partnerships.

10:20 am
Evolving Client Needs and Expectations Are Changing the Role of the Family Office

Moderator: Glen W. Johnson, Chief Operating Officer, Family Office Exchange

Mindy Earley, CMP, CFBA, Chief Learning Officer, FOX Family Learning Center, Family Office Exchange

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

How are you managing changes in your family? How about the changes coming down the road? We will share examples of how the shift in family priorities and the influence of the rising generations are driving the family office evolution.

10:45
Future of Technology in the Family Office

Moderator: Kent Lawson, Director, Technology Integration Services, Family Office Exchange

Catherine Garner, Head of Technology, Walton Enterprises

Robert Gray, Assistant Vice President, Enterprise Operations and Executive Security, Cox Enterprises, Inc.

Jonathan Tunner, Director, Private Investment Opportunities, Family Office Exchange

Kyle Yost, Finance Manager, Rock Ventures LLC

FOX's Kent Lawson will moderate a discussion on how family offices are incorporating automation to free resources for higher value add activities, leveraging data to make more informed decisions, partnering with third-parties to fill non-core capabilities, and ensuring it is all done with proper cybersecurity protocols to protect family data.

11:30 am Break

11:45 am Peer Dialogues

Meet directly with similarly sized offices to share best practices in changing approaches to tech, talent, and teaming.

- **Small Family Offices** (1-6 employees)
- **Medium Family Offices** (7-14 employees)
- **Large Family Offices** (15+ employees)
- **Multi-Family Offices and other Advisors**

12:30 pm Day 1 Concludes

Tuesday, September 22

10:00 am
Welcome and Introductions

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

10:10 am
Spot and Manage Talent in the New Paradigm

Moderator: Peter Leo, Director, Human Capital, Family Office Exchange

Cassie Attebury, Principal, Talent Outside the Lines

Neil Kreuzberger, President and Founder, Kreuzberger Associates, LLC

Covid-19 has changed all the rules. The familiar guideposts and benchmarks are now moving targets. Will being virtual help or hinder finding talent? How about retaining it? Is work from home a temporary or permanent condition? Our panel discussion will feature insights from experts who've faced down these challenging questions.

11:05 am Break

11:15 am Breakout Sessions

BREAKOUT 1: Results from FOX's 2020 Compensation & Benefits Survey, sponsored by Grant Thornton

Ken Cameron, Director, Grant Thornton, LLP

Glen W. Johnson, Chief Operating Officer, Family Office Exchange

Find out what we learned about current family office compensation and benefits practices, including how Covid-19 has affected office structures.

BREAKOUT 2: Managing Under Covid-19

Arden O'Connor, CEO, O'Connor Professional Group

Discuss how you're supporting employees and family members during Covid-19, including mental health, education, and work-from-home policies.

BREAKOUT 3: Using Tech to Develop Staff

Cassie Atteberry, Principal, Talent Outside the Lines

Peter Leo, Director, Human Capital Family Office Exchange

Learn about the latest in staff development, including how HRIS systems can support your efforts.

BREAKOUT 4: Improving Quality Through Family Office as a Service

Rob Mallernee, Chief Executive Officer, Chief Compliance Officer, Eton Advisors

Karen Rush, Managing Director, Membership, Family Office Exchange

Learn how process mapping can help firms improve quality of their client deliverables, operations, efficiency, and expenses.

BREAKOUT 5: Driving Efficiencies with Technology

Scott Winget, Market Leader, Enterprise Families, Family Office Exchange

Additional presenters forthcoming…

Family offices are increasingly leveraging tools to drive efficiency in the office, such as call scheduling, business intelligence, and client relationship management systems.

12:05 pm Day 2 Concludes

Wednesday, September 23

10:00 am
Welcome and Introductions

Karen Rush, Managing Director, Membership, Family Office Exchange

10:10 am
2020 Trust and Estate Update

Mark Harder, Partner, Warner Norcross & Judd LLP

Jamie Sanders, Partner, Tax, Private Client Services, RSM

Don't miss this perennial Family Office Forum classic. It doesn't take a crystal ball to know 2020 will usher in tax and estate planning change. The pandemic has disrupted the economy and interest rates, offering new opportunities for wealth transfer planning. Learn what you can do now and should do by the end of the year.

11:00 am Break

11:10 am
Delivering Value Through a Trusted Advisor Ecosystem

Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer, Family Office Exchange

Katherine Dunlevie, Managing Director and Executive Vice President, The Family Office at Synovus

David Toth, Managing Director, Family Office Exchange

Jonathan Tunner, Director, Private Investment Opportunities, Family Office Exchange

Rising family expectations paired with greater complexity have accelerated the need to work more closely with teams of advisors. It has become increasingly challenging to deliver against the breadth and depth of services family members require while. Learn from three different family office situations about the value of trusted experts and how to partner to achieve the greatest value and success. In this session we'll also explore how to build family and MFO partnerships that have long-term sustained value, what great direct investment partnerships look like and how to find them, and how to create a family educational ecosystem of experts and resources.

12:00 pm Closing Remarks

12:15 pm Forum Concludes

Registration Form (All registrations subject to approval by Family Office Exchange)

Registration Questions

Is this your first time attending the FOX Family Office Forum?

☐ Yes ☐ No

When do you expect most of your employees to return to the office*

☐ Most are already back ☐ Q4 2020 ☐ Q1 2021
☐ Q2 2021 ☐ Q3 2021 ☐ Never ☐ Unsure

What is your biggest concern as employees return to the office?*

MONDAY, SEPTEMBER 21

Please select your sessions:

☐ Welcome and Introductions; Ready or Not – Your Future Family Office is Here; Evolving Client Needs and Expectations Are Changing the Role of the Family Office; Future of Technology in the Family Office

Peer Dialogues:

☐ Small Family Offices (1-6 employees)
☐ Medium Family Offices (7-14 employees)
☐ Large Family Offices (15+ employees)
☐ Multi-Family Offices and other Advisors

TUESDAY, SEPTEMBER 22

Please select your sessions:

☐ Welcome and Introductions; Spot and Manage Talent in the New Paradigm

Breakout Sessions:

☐ Results from FOX's 2020 Compensation & Benefits Survey, sponsored by Grant Thornton
☐ Managing Under Covid-19
☐ Using Tech to Develop Staff
☐ Improving Quality through Family Office as a Service
☐ Driving Efficiencies with Technology

WEDNESDAY, SEPTEMBER 23

Please select your sessions:

☐ Welcome and Introductions; 2020 Trust and Estate Update
☐ Delivering Value Through a Trusted Advisor Ecosystem; Closing Remarks

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

If you are not a member of Family Office Exchange, please contact info@familyoffice.com for membership information.

Attendee Information

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

☐ I agree to my name appearing in the attendee listing.

☐ I do NOT agree to my name appearing in the attendee listing.

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 on-line, or submit this form by September 17, 2020 to participate.

Email: events@familyoffice.com

Online: familyoffice.com/FOF2020

Phone: 312.327.1221

Reset This Form | Email This Form to Register

*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.

FIELD OF STUDY: **Finance | Up to 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 Internet Based**

LEARNING OBJECTIVES: Upon completion of the program, participants will be able to identify the latest developments and solutions in talent, technology, trust and estate planning, family learning, as well as insights into building a proper advisor ecosystem.