

FOX Private Trust Company Workshop

Save the Date

Virtual Event | January 26-28, 2021

Visit familyoffice.com/PTC21 to be notified when registration opens.



The Private Trust Company (PTC) has passed the test of time as a robust structure for achieving the multi-generational goals of wealth preservation, stewardship, and long-term family governance. This program is essential for families and executives with an established PTC that want to better operate their unique PTC structure. We will bring together PTC Executives, family members and experts to share their experience and insight about the PTC's special role in the family enterprise.

FEATURED SPEAKER



The Pull of Purpose: Finding Freedom Through Stewardship

David York

David has over 20 years of insights and understanding working with over 7,000 clients including single and multi-generation families and business owners. He brings to the forefront the dynamics of external forces, along with “the meteors” from well-meaning but controlling estate plans that leave owners off-balance, confused and fatigued. But David goes beyond the reality to the break throughs achieved by those that live differently. These individuals are held steady by the pull of purpose with clarity, vision and balance that brings freedom to leverage blessings, gifts in trust and make lasting impacts in the world. They have found the secret to a life lived as.. a Steward.

*“You are owned by nothing when you only own your purpose.”
- David York*

AGENDA AT A GLANCE

Tuesday, January 26, 2021

- Participant Round Tables
- PTC Value, Cost, and Complexity Factors
- PTC Executive Panel Discussion: The Evolution of PTC Value and Complexity

Wednesday, Jan 27, 2021

- The Pull of Purpose: Finding Freedom Through Stewardship
- Peer Dialogue Sessions

Thursday, Jan 28, 2021

- Evolution and Risk Panel
- Breakout Sessions
 - The Family Enterprise: Folding the Family Office and PTC Together
 - Evolving Trends in PTC Investment Policies: Hype or Reality?
 - Trustee-Beneficiary Relationships: Are They Reflecting Your Family Culture?
- Bringing It All Together: A Family Story