Family Office Exchange

FOX RISING GEN
LEADERSHIP PROGRAM
SAPPHIRE EDITION

FEBRUARY 24-25, 2021 | VIRTUAL EVENT

TOPAZ SAPPHIRE EMERALD RUBY

PROGRAM CONTENT PILLARS:

- PERSONAL IDENTITY AND GROWTH
- FAMILY DYNAMICS AND FAMILY ENGAGEMENT
- SHARED OWNERSHIP AND LEADERSHIP
- GOVERNANCE AND BOARD TRAINING

ABOUT THE FOX RISING GEN LEADERSHIP PROGRAM SERIES

Family Office Exchange (FOX) is pleased to offer the Rising Gen Leadership Program Series for the preparation of future family leaders. This four-part learning series uses a multi-disciplinary approach to help Rising Generation family members become prepared, informed, credible, and contributing leaders to the family enterprise.

Each standalone program is designed to arm future family leaders with the skills needed to thrive in life, business, and wealth stewardship with an emphasis on empowering attendees and equipping them with a leadership toolkit for the future. Each course within the two-day program covers essential building blocks for family leadership preparation and is part of an overall core curriculum presented at each gemstone branded program.

Additionally, this series offers a peer community like no other that allows Rising Generation family members to have honest and informative conversations that address their unique questions related to family, business, and leadership.

WHO SHOULD ATTEND

Registration for the FOX Rising Gen Leadership Program is open to family members in their 20's, 30's, and 40's. Limited spaces are available, as this program is intended to provide an intimate experience that fosters connection among peers.

WHAT TO EXPECT

- A virtual opening session focused on creating a peer community and group cohesiveness.
- Deep connection to the content through practical application and experiential activities.
- Pre-work and reading prior to attendance.
- Attendance is required both days. Full participation and engagement are program expectations.

FOX RISING GEN LEARNING PROGRAM CONTENT PILLARS

	PERSONAL IDENTITY AND GROWTH	FAMILY DYNAMICS AND FAMILY ENGAGEMENT	SHARED OWNERSHIP AND LEADERSHIP	GOVERNANCE AND BOARD TRAINING
TOPAZ	Personal Skills Inventory and Assessments	Effective Communication in a Family Setting	Developing Ownership and Leadership Skills	Principles of Family Governance
SAPPHIRE	Living an Authentic Life with Purpose	Family Dynamics in the Modern Families	Building Trust and Consensus in the Family	Decision Making Roles and Responsibilities *(Agreements vs Charters, Council, Committee)*
EMERALD	Meaningful Relationships and Family Boundaries	Family Patterns and Polarities	Conflict Resolution and Negotiating Skills	Preparation, Behavior and Best Practices in the Boardroom
RUBY	Your Relationship with Money	Family Transitions and Succession	Managing Change and Selecting Leaders in Your Family	Community Boards for Impact and Collaboration

AGENDA

All times listed are in U.S. Central Time

DAY 1: WEDNESDAY, FEBRUARY 24

9:30 AM	Introduction and Networking Activity
11:00 AM	**LIVING AN AUTHENTIC LIFE WITH PURPOSE** *Personal Development | 3.0 CPE*
12:30 PM	Lunch Break
1:15 PM	**FAMILY DYNAMICS IN MODERN FAMILIES** *Specialized Knowledge | 3.0 CPE*
3:30 PM	Personal Reflection
3:30 PM	Meeting Adjournment

DAY 2: THURSDAY, FEBRUARY 25

9:30 AM	Reflections and Group Activity
10:15 AM	**BUILDING TRUST AND CONSENSUS IN THE FAMILY** *Specialized Knowledge | 2.5 CPE*
11:45 AM	Lunch Break
1:00 PM	**DECISION MAKING ROLES AND RESPONSIBILITIES** *Specialized Knowledge | 3.0 CPE*
2:30 PM	Practical Application and Final Reflection
3:30 PM	Meeting Adjournment

CORE CURRICULUM AND COURSE DESCRIPTIONS

LIVING AN AUTHENTIC LIFE WITH PURPOSE

Personal Development | 3.0 CPE

Wealth can offer a paralyzing number of choices regarding what to do with your life. Considering your family's legacy, your own interests, and what you bring to the table can give rise to the challenge of how to make your life meaningful. How do you define work and where does it fit in your world? How do you balance both your career and family engagement? Whether you have previously considered a purpose-driven life or found your purpose shifting in recent years, this module will provide the planning tools necessary to navigate this process thoughtfully and with authenticity.

FAMILY DYNAMICS IN MODERN FAMILIES

Specialized Knowledge | 3.0 CPE

The nuclear family of 2020 does not resemble the nuclear family of the past. This session will challenge you to evaluate your own definition of 'family' with which you live and engage. Explore the stories of wealthy families who confronted issues of inclusion head on. Under what conditions are spouses involved in the affairs of your family? Do domestic, live-in partners get any access to your family office services? Are there smaller roles in your governance structure that could open doors for not only new family members, but new ideas? We will explore how to usher in inclusion where you feel it is most needed in your family.

BUILDING TRUST AND CONSENSUS IN THE FAMILY

Specialized Knowledge | 2.5 CPE

This year's dramatic events have shifted the tone of conversations in many families, surfacing differing philosophical views and diverse risk-taking appetites. Join the discussion on how families can build trust across divides and strengthen relationships across the family. We'll outline consensus-building steps and give you group exercise ideas to help your family develop a pathway toward agreement on important topics. It takes some effort, but the payoff of a shared vision for the family's future is worth it.

DECISION MAKING ROLES AND RESPONSIBILITIES

Specialized Knowledge | 3.0 CPE

Families have endless choices to make. From where to hold the family meeting, to selecting the next family leaders, the process for making those choices impacts all areas of the family enterprise. Combining theory and practice, you will learn about varying models and approaches for decision making as well as tools to make effective decisions utilizing a group process. We will review concepts and techniques to use when determining outcomes individually versus as a group and the advantages and disadvantages of a consensus-based process. You will learn about different agreements, policies, governance structures and committees that support the work that determines the outcomes for the family. Gain confidence in your ability to understand the governance process so you can interpret your own family situation.

PROGRAM FACULTY

MINDY KALINOWSKI EARLEY, CMP, CFBA

Chief Learning Officer, FOX Family Learning Center™

Mindy Earley is Chief Learning Officer for Family Office Exchange. In her role, she works to foster integrated learning programs for enterprise families and is responsible for developing the family learning community. She provides support to the Family Learning and Experience Council and FOX Family Learning Network. Mindy is inspired by helping people learn, grow and discover the way that they will make personal and productive contributions, using their strengths and talents.

Mindy has held various roles in small and large family offices and has been responsible for creating and stewarding professional learning networks in support of human and intellectual capital. She has designed learning experiences that increase the knowledge base and enhance the life path of individuals while providing personalized support and coaching to help them meet their goals.

SARA HAMILTON

Founder and CEO, 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 27 countries. FOX has built a unique team of professionals serving multi-generational families, led by 20 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, San Francisco, and Madrid.

PROGRAM FACULTY

JEFF STRESE

Adjunct Professor, Cox School of Business Executive Education, Southern Methodist University

Jeff Strese is an Organizational Development Consultant focusing on multi-generational family enterprises, corporations, and mission-driven nonprofit organizations. He has more than 25 years experience working across industries in the areas of leadership development, organizational effectiveness and family dynamics. He holds certifications in family wealth and family business advising (CFWA, CFBA).

Jeff is passionate about helping family businesses and organizations create clarity out of the complex and inspiring leaders from all backgrounds to develop and master critical skills like coaching, communication and emotional intelligence. He has developed innovative programs to guide next-generation leaders to reach their full potential in a fast-paced, global economy.

Jeff has served as Chief Talent and Learning Officer (CTLO) at Tolleson Wealth Management, a multi-family office serving client families across the country. Prior to his role at Tolleson, Jeff served as the Chief Human Resources Officer (CHRO) at Southern Methodist University (SMU).

ELLIE FREY ZAGEL

President and Founder, Successful Generations

Ellie Frey Zagel is a leadership coach specializing in multi-generational family businesses. She helps next generation leaders thrive in times of uncertainty and crisis. Committed to serving her audience and sharing her expertise, Ellie founded Successful Generations, LLC and launched a same-name podcast for family businesses and philanthropic communities. Ellie has spoken around the country on next generation issues in family business and family philanthropy. Ellie is also third generation Vice Chair and Trustee of her family's foundation, The Frey Foundation (based in Grand Rapids, MI). For nearly a decade, Ellie has been deeply involved in working with the next generation of family businesses; first, as Director of the Family Business Alliance and now, as President of Successful Generations.

PROGRAM FACULTY

KIM KAMIN

Principal, Gresham Partners, LLC

Kim Kamin is a Principal at Gresham Partners, LLC, an independent multi-family office that currently serves about 100 ultra-high net worth families nationally. At Gresham, Ms. Kamin serves as Chief Wealth Strategist, leading Gresham's development and implementation of estate, wealth transfer, philanthropic, educational and fiduciary planning activities. Previously she was a partner in the Private Clients, Trusts and Estates Group at Schiff Hardin LLP where for many years her legal practice involved all aspects of trust and estate planning, administration, dispute resolution; advising families and their privately held businesses on a wide array of wealth preservation, asset protection and succession planning issues; and serving as counsel for the formation and operation of not-for-profit entities.

Ms. Kamin is an adjunct professor at the Northwestern University Pritzker School of Law where she was awarded the William M. Trumbull Lectureship, and has taught Advanced Trusts and Estates, Income Taxation of Trusts and Estates, and Estate Planning. She is also on faculty for the Certified Private Wealth Advisor® (CPWA®) program through the University of Chicago Booth School of Business Executive Education.

Ms. Kamin is on the Editorial Advisory Board of Trusts & Estates Magazine and has authored numerous pieces. She has published on a wide variety of topics and is also a frequent lecturer in a variety of venues across the country, such as Family Office Exchange, ACTEC, Heckerling Institute on Estate Planning, ALI-CLE, Purposeful Planning Institute, and many more.

Ms. Kamin received her B.A., with distinction and departmental honors in Psychology from Stanford University and her J.D. from the University of Chicago Law School. She is an AEP® and a 21/64 Certified Advisor.

LOCATION AND CPE CREDITS

PROGRAM WILL BE HELD VIRTUALLY

Please visit **www.familyoffice.com/RGS21** for more information.

FIELD OF STUDY: Personal Development and Specialized Knowledge | Up to 11.5 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 this program, participants will gain an understanding of how to assess their own learning style, learn leadership skills for earning authority, receive an overview of personal financial literacy, and will learn tools and skills for board training and stewardship.

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.

PROGRAM REGISTRATION

Space is limited. All attendees must register online or submit this registration form prior to February 12, 2021 to secure a seat.

HOW TO REGISTER

Advance registration is required. All attendees must register on-line, or submit this form by February 12, 2021 to participate.

Email: **events@familyoffice.com**

Online: **www.familyoffice.com/RGS21**

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 - PLEASE SELECT

FOX MEMBER		NON-MEMBERS
FIRST PAID ATTENDEE ☐ $2,900	FAMILY GROUP RATE *per attendee* ☐ $2,750	☐ $3,500*

If you would like to take advantage of FOX Member Family Group Rate pricing, please email us directly at **events@familyoffice.com**

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

ATTENDEE INFORMATION

*Name (First/Last)**

*Name of Firm/Family Office**

*Title/Position**

SHIPPING ADDRESS FOR PROGRAM MATERIALS

*Street Address**

*City**

*State/Province**

*Country**

*Zip/Postal Code**

*Phone**

*E-mail**

REGISTRATION QUESTIONS

Registration for the FOX Rising Gen Leadership Program is open to family members in their 20's, 30's, and 40's, who are aspiring leaders within their family's enterprise. All registrations subject to approval by FOX.

Please select your age range:*

20-29 30-39 40+

Please select your generation in the family:

Gen 1 Gen 2 Gen 3 Gen 4 Gen 5 Gen 6 Unknown

What is your role in the family today? (current or potential role)

What is your desired role in the future?

My biggest challenge as a member of the rising generation is:

Where is your Family Office Located? (city/state)

Where do you currently live? (city/state)

This program involves pre-work which must be completed in advance. Participants should expect to receive an email with instructions and plan to complete the materials well before the program begins.

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 **www.familyoffice.com/RGS21**

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

Contact us at **events@familyoffice.com** or call **312.327.1221** if you have questions.

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.