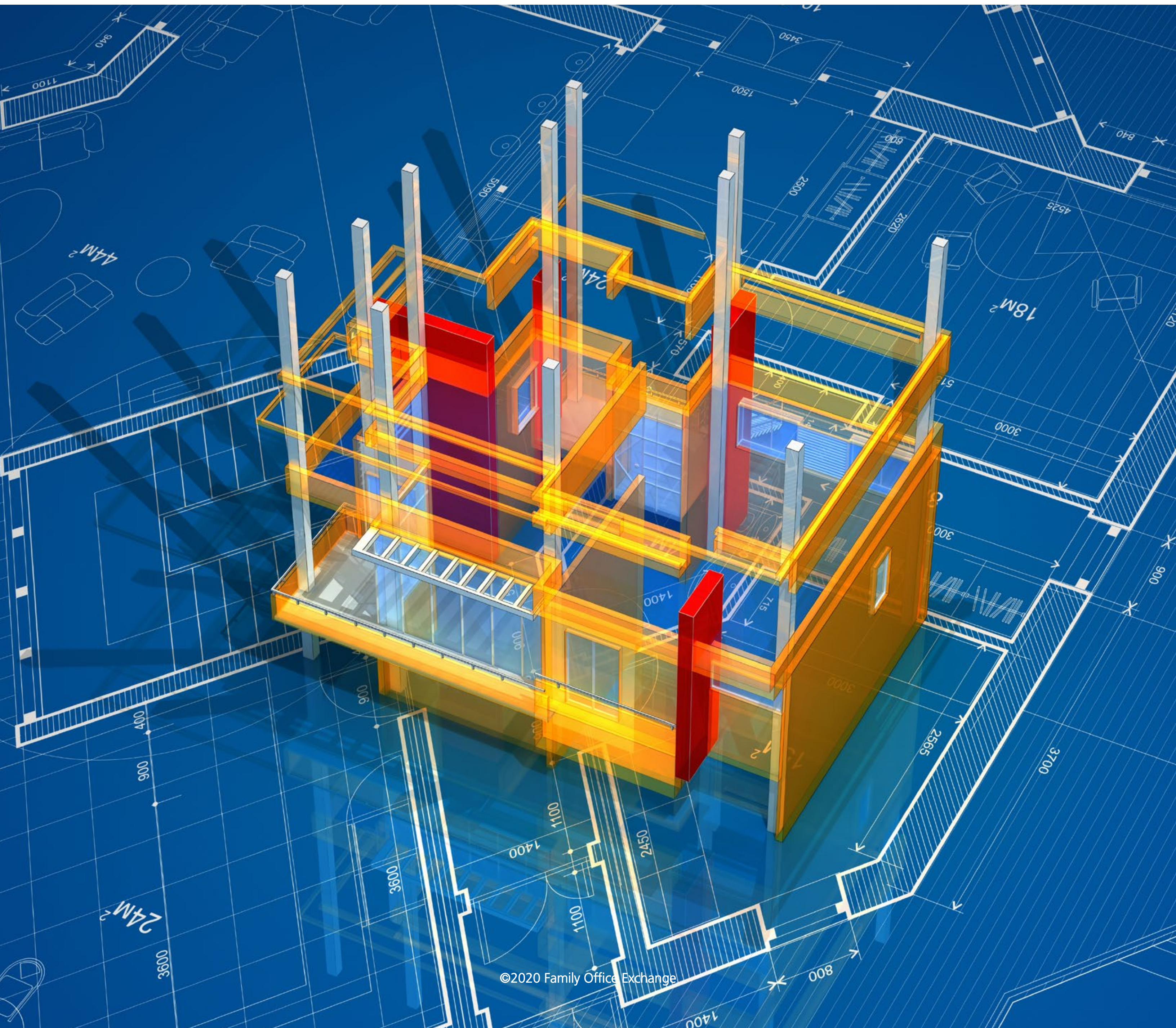
Family Office Exchange | 30 YEARS

FOX Family Office Design Virtual Workshop

Virtual Event | November 17-19, 2020



FOX Family Office Design Virtual Workshop Overview

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The FOX Family Office Design Workshop will cover basic principles of a well-run family office and provide 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 nearly 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.

What to Expect

- Understand the critical dimensions of a family office
- Review the range of services that can be provided by a family office
- 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 performance of the office

Who Should Attend

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

Workshop at a Glance

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.

All times listed are in U.S. Central Time
Daily Sessions 10:00 AM - 12:00 PM and 2:00 PM - 3:00 PM CT

Tuesday, November 17

10:00 AM	Introductions and Expectations
10:50 AM	Break
11:00 AM	**Family Office Goals and Roles**
11:50 AM	Answers to Your Questions
12:00 PM	Mid-day Break
2:00 PM	**Scope of Services and Service Delivery**
2:50 PM	Q & A
3:00 PM	Day 1 Concludes

Wednesday, November 18

10:00 AM	**Organization and Team Structure**
10:50 AM	Break
11:00 AM	**Technology to Support the Family Office**
11:50 AM	Q & A
12:00 PM	Mid-day Break
2:00 PM	**Complexity and Cost of the Family Office**
2:50 PM	Q & A
3:00 PM	Day 2 Concludes

Thursday, November 19

10:00 AM	**Ownership and Governance**
10:50 AM	Break
11:00 AM	**Q & A and Lessons Learned**
12:00 PM	Mid-day Break
2:00 PM	**Initial Design and Next Steps for Your Office**
2:50 PM	Final Questions and Wrap-up
3:00 PM	Day 3 Concludes

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MODULE 1

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 risk manager and other roles are introduced.

MODULE 2

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 to meet the technical requirements of managing a family's wealth and enhance family meetings, educate the next generation, among other benefits.

MODULE 3

Organization and Team Structure

Introduces the notion that the integrity of the family office staff has the greatest impact on the office's success. This session examines the roles and responsibilities of staff members, organizational structures, mapping of key skills to services, coordination and oversight of third-party advisors, and compensation.

MODULE 4

Technology to Support the Family Office

The Technology of the Family Office is a direct reflection of 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.

MODULE 5

Complexity and Cost of the Family Office

Family offices have a wide range of costs and the important relationship between cost, breadth of service, and complexity will be explored. Total cost of wealth management will also be examined.

MODULE 6

Ownership and Governance

Provides an understanding of family office board structures and functions as well as decision-making processes in family offices, with reference to mission, leadership, and succession. Benefits of governance and appropriate degrees of formality are addressed.

MODULE 7

Q & A and Lessons Learned

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

MODULE 8

Initial Design for Your Family Office

Through concepts and templates provided to participants during the session, this discussion will focus on strategies for designing and refining your family office.

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Sara Hamilton

Founder and Chief Executive Officer, 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 20 countries. FOX has built a unique team of professionals serving multigenerational families, led by 15 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, and Madrid.

Glen W. Johnson

Chief Operating Officer, Family Office Exchange

Glen Johnson is Chief Operating Officer at Family Office Exchange (FOX). In this role, he is responsible for all aspects of the member experience, ensuring that each family member, family office executive, and trusted advisor has an unsurpassed experience partnering with FOX by providing unique industry knowledge and insights coupled with a safe and confidential environment where members can share best practices. Glen has over 30 years of experience working with family offices, business owners, and executives, first as an attorney and then as a wealth advisor, eventually founding Mirador Family Wealth Advisors – the multi-family office for Fifth Third Bank. Glen earned a Bachelor of Sciences degree in Education from the University of Michigan in Ann Arbor, MI and a Juris Doctorate degree from Wayne State University Law School in Detroit, MI.

Scott Winget

Market Leader, Enterprise Families, Family Office Exchange

Scott Winget is the market leader for Enterprise Families at Family Office Exchange (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. He 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.

Kent Lawson

Director, Technology Integration Services, Family Office Exchange

Kent Lawson is a key resource for FOX and leads endeavors focused on technology among other important deliverables to clients of FOX. Kent has spent over 25 years serving the wealth management community in a variety of roles. He has run his own organizations providing strategic leadership as a trusted advisor and has more than a decade of technology, vendor experience, and over 10 years at the executive level within a single family office.

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 **7 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 Live Program**

LEARNING OBJECTIVES Upon completion of this program, participants will gain an understanding of the steps required, and mistakes to avoid, when developing an effective family office. Additional program objectives include: insights regarding oversight of the family office, services scope and delivery, costs of the family office, talent and team structure, technology and data security, performance metrics and best practices, and family office planning steps.

FOX Family Office Design Virtual Workshop Registration

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Daily Sessions 10:00 AM - 12:00 PM and 2:00 PM - 3:00 PM CT

HOW TO REGISTER

Advance registration is required. All attendees must register on-line, or submit this form by November 10, 2020 to participate.

Email: **events@familyoffice.com**

Online: **familyoffice.com/FOD20**

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	☐ $2,500	☐ $3,000
ADDITIONAL PAID ATTENDEES	☐ $2,250	☐ $2,700

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

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
Family Leader
Board Chairperson
Board Member
Trustee
Rising Gen Leader
Family Office Executive
Philanthropic Director
Advisor to Family
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?*

Which of these topics are most important to you in your situation?* (Please rank each option below 1-8, 1 being the most important and 8 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
Q & A and Lessons Learned
Initial Design and Next Steps for Your Office

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/FOD20**

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.