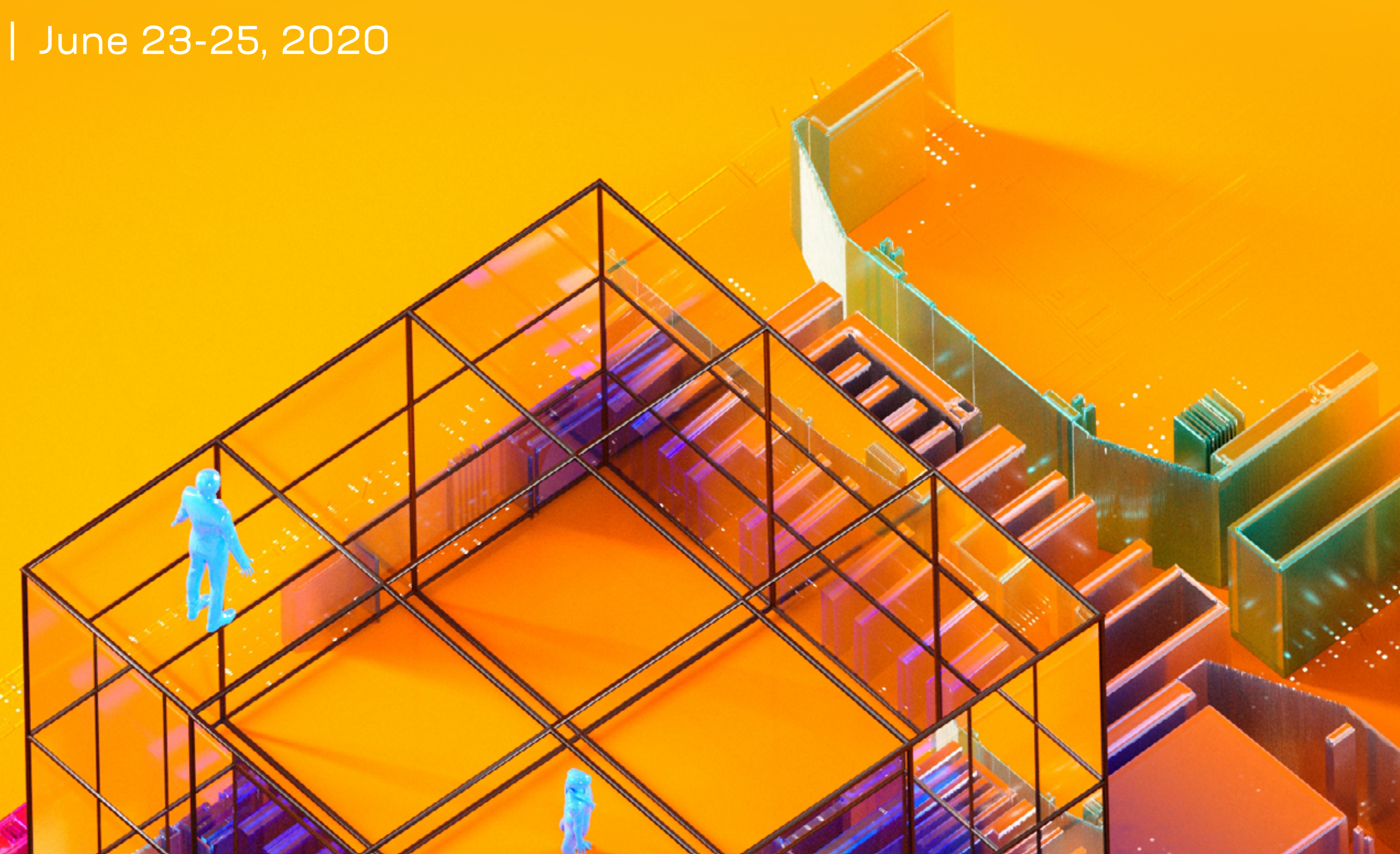
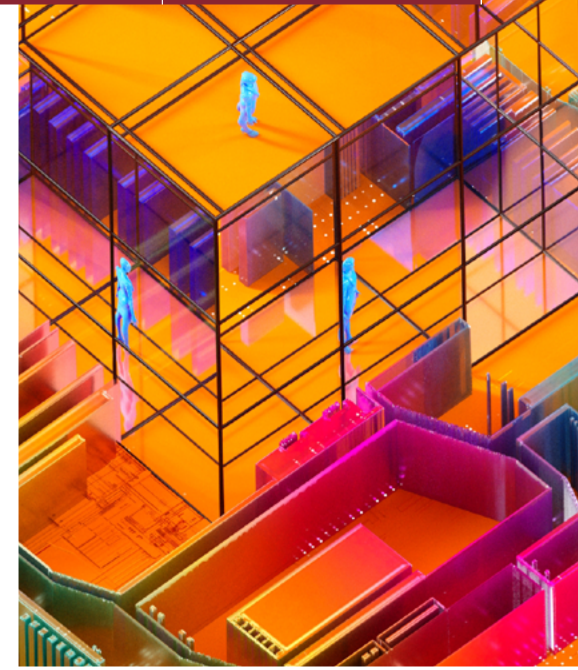
Family Office Exchange | 30 YEARS

FOX Wealth Advisor Forum

Virtual Event | June 23-25, 2020





Overview

Due to the ongoing global pandemic, this year's **FOX Wealth Advisor Forum**™ has gone virtual. Over the course of three days we will focus on key issues that will likely endure during and beyond the pandemic. We will explore promising technologies, the evolving advisor/client relationship, best practices for engaging clients virtually, business development in the new paradigm, and how to build a resilient firm culture all in an effort to help you navigate the challenges now and in the future.

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

Tuesday, June 23

10:00 am	Welcome and What's on the Minds of Members
10:10 am	The Future of Wealth Management Technology
11:00 am	Break
11:05 am	The Evolving Role of the Wealth Advisor
11:55 am	Q & A and Wrap-Up
12:00 pm	Day 1 Concludes

Wednesday, June 24

10:00 am	Introduction to Day 2
10:05 am	Business Development in the Age of Digital Privacy and Personalization
10:55 am	Break
11:00 am	Best Practices for Virtual Client Engagement
11:50 am	Q & A and Wrap-Up
12:00 pm	Day 2 Concludes

Thursday, June 25

11:00 am	Introduction to Day 3
11:05 am	Resilience and Growth in Disruptive Times
12:35 pm	Q & A and Wrap-Up
12:40 pm	Forum Concludes

Presenters

Doug Fritz
CEO and Founder
F2 Strategy

Nicholas Petrie
Author
Work Without Stress: Building a Resilient Mindset for Lasting Success

David Toth
Managing Director
Family Office Exchange

Glen W. Johnson
Chief Operating Officer
Family Office Exchange

Karen Rush
Managing Director, Membership
Family Office Exchange

Jaclyn Webb
Family Learning and Events Manager
Walton Enterprises

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

Bill Sullivan
President
Family Office Exchange

Scott Winget
Market Leader, Enterprise Families
Family Office Exchange

Thomas P. Melcher
Managing Director, Director of Family Wealth, Glenmede

Amy E. Szostak
Senior Vice President, Director of Family Education and Governance
Northern Trust

John Zimmerman
President, Ascent Private Capital Management of U.S. Bank

Milton Pedraza
Chief Executive Officer
Luxury Institute, LLC

Jack Thurman
Managing Partner
BKD Family Office

Tuesday, June 23

10:00 am
Welcome and What's on the Minds of Members

Bill Sullivan, President, Family Office Exchange

Identifying the trends and issues affecting families of wealth is a large part of our mission at FOX. To kick off the forum, we'll explore what's top-of-mind for members right now.

10:10 am
The Future of Wealth Management Technology

Doug Fritz, CEO, F2 Strategy

In this keynote session, a tenured wealth management chief technology officer will address the widening gap between ultra-wealthy clients' expectations and the actual value delivered. We'll discuss how firms successfully innovate and work differently to adapt to evolving client needs and will provide insights from our family office membership. Additionally, we'll explore the complex wealth advisor ecosystem and why finding the right partnership can be a game changer.

11:00 am
Break

11:05 am
The Evolving Role of the Wealth Advisor

Thomas P. Melcher, Managing Director, Director of Family Wealth, Glenmede

Jack Thurman, Managing Partner, BDK Family Office

John Zimmerman, President, Ascent Private Capital Management of U.S. Bank

David Toth, Managing Director, Family Office Exchange

Moderated by FOX's David Toth, we'll hear from three prominent wealth advisors regarding the advisor role, how they see the role evolving, the technology influencing what they do and how they do it, and the skill sets they seek in the next advisor generation.

11:55 am
Q & A and Wrap-Up

12:00 pm
Day 1 Concludes

Wednesday, June 24

10:00 am
Introduction to Day 2

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

10:05 am
Business Development in the Age of Digital Privacy and Personalization

Milton Pedraza, Chief Executive Officer, Luxury Institute, LLC

During and post pandemic affluent consumers of all generations will work remotely more often, enabling them to become more digital, and generating more personal data, than ever before. Milton Pedraza, Luxury Institute CEO, shares insights and recommendations on how human emotional intelligence optimized with innovations in advanced personalization through privileged access to personal data, powered by AI, can be implemented to achieve high-performance client relationship building today, and beyond.

10:55 am
Break

11:00 am
Best Practices for Virtual Client Engagement

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

Amy E. Szostak, Senior Vice President, Director of Family Education and Governance, Northern Trust

Jaclyn Webb, Family Learning and Events Manager, Walton Enterprises

Karen Rush, Managing Director, Membership, Family Office Exchange

With almost all meetings now happening virtually, how are firms establishing and growing client relationships? Demonstrating your firm's capabilities, better understanding client needs, maximizing touchpoints, and building deeper client relationships are all important client engagement goals. In this session, leading family learning and events professionals will share their successful strategies and activities to reinvent engagement activities, as well as tips and best practices to help you reinvigorate your own client engagement strategy.

11:50 am
Q & A and Wrap-Up

12:00 pm
Day 2 Concludes

Thursday, June 25

11:00 am
Introduction to Day 3

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

11:05 am
Resilience and Growth in Disruptive Times

Nicholas Petrie, Author, *Work Without Stress: Building a Resilient Mindset for Lasting Success*

How we think and feel impacts our health, decision making and actions. Learn from 30 years of research on how people react during times of adversity, and the most effective ways to cope and grow. You'll gain insight into your personal resilience profile and discover how you can help others deal with the demands of this challenging time. You'll learn:

- How we react to disruptions affects stress levels
- The importance of resilience on our health
- Your own resilience profile assessment
- Four steps to decrease stress even in challenging times
- The power of adversity to promote growth for individuals and organizations
- The three stages of disruptive change and key actions to take

12:35 am
Q & A and Wrap-Up

12:40 pm
Forum Concludes

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

Registration Questions

Is this your first time attending the FOX Wealth Advisor Forum?*

☐ Yes ☐ No

What key takeaway do you hope to gain at the FOX Wealth Advisor Forum?*

What is your top concern about the changing landscape of the ultra-high net worth business?*

Which 3 topics are your clients most worried about over the next 12 months?*

- ☐ Covid 19 Pandemic
- ☐ Reopening Offices
- ☐ Political / Racial Tension
- ☐ Global Recession
- ☐ Climate Change / Natural Disasters
- ☐ U.S. Presidential Election
- ☐ Cybersecurity Threats
- ☐ Direct Investing
- ☐ Disruptive Technologies
- ☐ Family Learning Programs
- ☐ Health & Wellness
- ☐ Impact / Sustainable Investing
- ☐ Succession Planning

If you were referred to this event, please advise who referred you.

There is no cost for FOX members to attend the FOX Wealth Advisor 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 Wealth Advisor 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 Wealth Advisor 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 June 22, 2020 to participate.

Email: **events@familyoffice.com**

Online: **familyoffice.com/WAF2020**

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.

CPE Sponsors — National Registry of CPE Sponsors

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 5.5 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 understand trends related to evolving client needs, the industry and workforce. Participants will also gain practical strategies for building strong teams, skills to build better client relationships, and approaches to standing out as a thought leader within a crowded landscape.