Family Office Exchange

FOX FAMILY OFFICE BEST PRACTICES WORKSHOP

Developing and Improving Your Family Office

March 6, 2018 | The Langham Melbourne | Melbourne, Victoria, Australia

Drawing on almost 30 years of experience and using our proprietary Family Office Blueprint™ process, FOX presents the Family Office Best Practices Workshop designed for families thinking about developing and improving their family office.

Families and executives who are thinking about being more strategic and professionalizing their family office want to do it right. They want to know what steps to take, when to take them, and how to avoid setbacks.

This one-day workshop addresses issues – strategic and tactical - that family members and family office executives need to understand in conjunction with best practices:

1. Family Office Strategy
2. Governance of the Family Office
3. Scope of Services and Delivery
4. Talent and Team Structure
5. Costs of the Family Office
6. Performance Metrics
7. Family Office Planning Steps and Best Practices

The workshop includes the sharing of FOX proprietary concepts, practical solutions, and incorporates brand new data from our 2017 family office benchmarking survey. An Australian perspective will be shared in this interactive program.

Family members and family office executives are encouraged to attend. We look forward to seeing you and your peers on March 6, 2018 in Melbourne.

Family Office Exchange

8:00 am Breakfast and Registration

8:45 am Welcome and Introductions

9:15 am Family Office Strategy

This session introduces the family office and the family enterprise. Key issues such as establishment of office goals and their alignment with the family's needs, attributes of multi-generational and holistic wealth management, roles of family members and the office, and evolution of the office will be examined.

Questions & Answers

10:00 am Governance of the Family Office

The session necessarily offers an understanding of governance in a family office and family enterprise setting, including key elements such as vision, leadership, decision-making, and types of oversight structures. The degree of formality and evolution of that governance over different generations will be examined.

Questions & Answers

11:15 am Scope of Services and Delivery

Services provided by family offices are, by definition, customized and integrated to meet the technical needs of managing a family's wealth (tax, investment, recordkeeping, etc.) but also supports the family to enhance family continuity. The scope of the "modern" family office's services and their delivery, will be examined.

Questions & Answers

12:00 pm Talent and Team Structure

The skill set and integrity of the family office staff have the greatest impact on the office's success. In this session, we will examine the roles and responsibilities of staff members, organizational structures, mapping staff and key skills to services, and coordination and oversight of third party advisors.

Questions & Answers

12:45 pm Luncheon

The Family Office and the Bigger Picture

Please note: speakers, sessions, and times are subject to change. |

Afternoon Agenda | Tuesday, March 6, 2018

FOX Family Office Best Practices Workshop

1:45 pm Costs of the Family Office

Leveraging the insights from the FOX 2017 Family Office Benchmarking™ survey, FOX will present data and concepts about family office (and total wealth management) costs and outline common allocation methods and fee structures.

Questions & Answers

2:30 pm Performance Metrics

The establishment of benchmarks and matching these to family and family office goals is critical. What are the subjective and objective measurements that are used in family offices? The session will explore the issue and how to implement and monitor metrics.

Questions & Answers

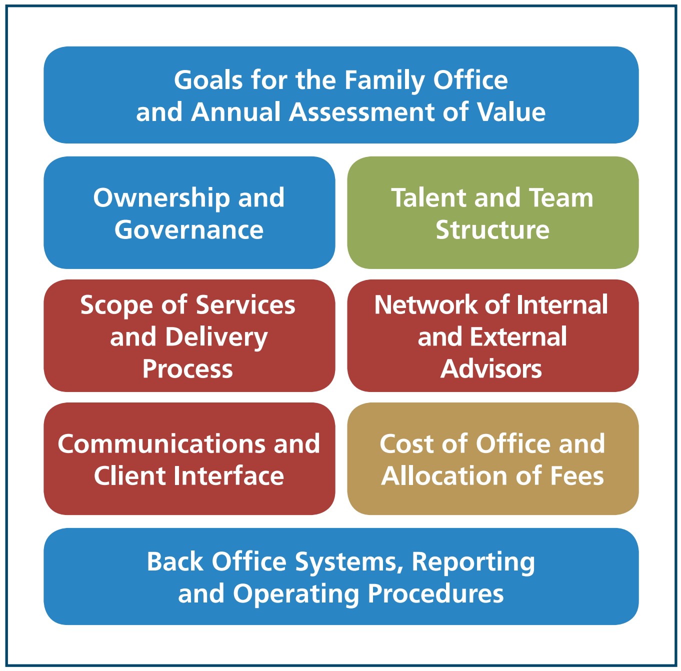
3:30 pm Planning Steps and Best Practices

The program sets forth helpful planning tips and templates that outline critical steps in the family office design and improvement process. Peer exchange and sharing of best practices will also be part of the discussion.

5:00 pm Adjourn

5:00 pm Cocktail Reception

Architecture for Family Offices



Charles B. Grace, III

Managing Director, Family Office Exchange

Charles B. Grace, III is a Managing Director at Family Office Exchange (FOX). He works on projects for families and family offices. Assignments include work on strategic planning, family office and family enterprise design, governance, development of investment programs, advisor selection, among others. Charlie is also active on the family office and advisor membership and research side at FOX, including investment focused studies and other initiatives.

Charlie has been active for 20 years in the family office community advising high net worth families and serving as a resource to high net worth families and family offices. He advised on investment portfolios and wealth management generally for 10 years working day-to-day at the multi-family office Ashbridge Investment Management LLC and the single family office Ashbridge, LLC. His responsibilities were broad and included firm strategy as Chairman of the Management Committee of the $1 billion investment advisory firm. He still serves on the Board of the single family office Ashbridge, LLC. Charlie has been quoted in various publications on the subject of private wealth management, including *The Wall Street Journal*, *Financial Times*, and *New York Times* and presented at many conferences focused on private investors and family offices.

Charlie is on the Executive Committee, as well as Treasurer and Investment Committee member, of the nonprofit Tuttle Fund, Inc. He graduated from the Washington College of Law with a J.D. He received a B.A. and M.A. in history from Bates College and the American University, respectively.

Peter Roach

Market Leader, Australia and New Zealand, Family Office Exchange

Peter Roach is the Market Leader for Australia and New Zealand for Family Office Exchange (FOX). Peter leads the FOX Family Enterprise Council and works with FOX members on applying FOX-identified global best practices to management of their wealth and their families.

Peter is well known in the family office sector. He was Chief Executive Officer of the Fairfax Family Office, Cambooya Services, from 2000-2012. In conjunction with that role, he was a Non-Executive Director of Rural Press Limited, Landis+Gyr AG and other boards associated with the family's media and private equity interests.

After stepping down from Cambooya Services, Peter served as an independent, non-executive director of various boards of generational families across Australia. In addition to Cambooya Services, Peter has also worked with one of Australia's largest banks, Commonwealth Bank, developing its family office services.

Peter is a Chartered Accountant and holds a Bachelor of Commerce (UNSW), a Master of Business Administration (SCU) and a Master of Letters (CQU). He is a Fellow of the Australian Institute of Company Directors and a Chartered Tax Adviser.

About Family Office Exchange

Family Office Exchange

Family Office Exchange (FOX) is the world's leading peer-to-peer network for ultra-wealthy family enterprises and their family offices, and is the leading authority related to matters of sustaining wealth. With more than 25 years of experience, and a staff of 40 people based in Chicago, New York, San Francisco, Madrid, and Sydney, FOX is a thought leader in the areas of family strategy and family enterprise, family office best practices, and family risk and legacy planning.

FOX serves family groups and their advisors in 20 countries, providing trusted insight and best practices for managing family wealth. The network includes 330 ultra-wealthy families, as well as 160 multi-family offices (MFOs) and advisory firms. More than 6,000 individual family members are served by the FOX global community.

Members rely on FOX (www.familyoffice.com) to help them make better, more informed decisions about their family legacy and their wealth management practices and providers. FOX has established a safe, confidential environment of common interest and mutual trust to enable members to compare experiences and learn from the collective knowledge of other members in the network. Resources available to FOX members include proprietary research on wealth management best practices, peer benchmarking, bi-monthly webinars on current trends, and an extensive library of articles and white papers, as well as online discussion forums, regional peer roundtables, and a variety of educational workshops and forums.

Sara Hamilton founded FOX in 1989 to provide objective information and advice on family wealth, family leadership, and different pathways available to sustain wealth across generations. Helping members preserve and enhance their true family wealth by providing education, insights, and peer exchange is the sole focus of FOX. The firm's success is measured by the quality and value of the experience of its many private investors, family offices, multi-family offices, and wealth advisor members. True to this original vision, FOX strives to address new challenges and to provide insights on current trends and issues regarding investing, philanthropy, and owner education. As an advocate for wealth owners and advisors, FOX provides leadership in the private wealth field, helping to shape the industry and develop standards of performance for industry professionals.

The benefits of FOX Membership fall into four categories easily remembered by the acronym P.E.A.K

Peer Community

Families and executives come to FOX to meet counterparts from other families and learn what they are doing.

- **FOX Forums**
- **Regional Member Briefings**
- **FOX Peer Councils**
- **Private FOXChat™ Online Discussion Group**

Education

Raising the next generation to be responsible adults who are able to manage their wealth knowledgeably requires thoughtful education.

- **Live Webinars**
- **FOX Workshops and Events**
- **University of Chicago Booth School of Business - Private Wealth Management Course**

Advice

FOX provides on-going guidance on best practices and how to respond to new challenges you haven't faced before.

- **Experienced Relationship Managers**
- **FOX Member Networks**
- **FOX Advisor Directory**

Knowledge

The FOX Knowledge Center gathers insights, solutions, and wealth management resources for families, private investors, and their advisors.

- **FOX Knowledge Center**
- **FOX Benchmarking**
- **FOX Insights Blog**
- **FOXConnects™ Newsletter**

FOX Family Office Best Practices Workshop - Registration Form

March 6, 2018 | The Langham Melbourne | Melbourne, Victoria, Australia

The FOX Family Office Best Practices Workshop is open to family members and their office executives. In select instances an advisor working closely with a family may be approved by FOX to attend designated portions of the workshop with that family.

All registrations are subject to approval by FOX. Space is limited and all attendees must register online or with this form.

Please answer the following questions:

Are you one of the following?

- ❍ I am a family member
- ❍ I am a family office executive
- ❍ I am an external advisor

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?

____

What are you hoping to learn from this workshop?

____

____

____

What generation is your family leadership?

____

(G1, G2, G3, G4)

Were you referred to this workshop? If so, by whom?

____

____

Dietary or other special needs:

____

____

Reception

Do you plan to attend the reception on Tuesday, March 6?

❍ Yes ❍ No

Three Ways To Register

1. **Scan and email** to: events@familyoffice.com
2. **Register online** at: https://www.familyoffice.com/learning-programs/workshops/fox-family-office-best-practices-workshop-australia-march-6-2018
3. **Fax this form** to: 1.312.327.1212

Questions? Contact us at events@familyoffice.com or call **1.312.327.1221**

Attendee Information

Name (First/Last) ______________________

Name of Firm/Family Office ______________________

Title/Position ______________________

Street Address ______________________

City ______________________ State/Province ______________________

Country ______________________ Zip/Postal Code ______________________

Phone ______________________

E-mail ______________________

Registration Fees

FOX Member	Non-Member
☐ **$2,300USD**	☐ **$2,700USD**
Additional Attendees	Additional Attendees
☐ **$1,950USD**	☐ **$2,300USD**

Workshop Location

The Langham Melbourne
1 Southgate Avenue, Southbank,
Melbourne, Victoria 3006, Australia
http://www.langhamhotels.com/en/the-langham/melbourne/

For the latest information on venue and accommodations, please visit us online at www.familyoffice.com.

Payment Methods

❍ **Payment by check is enclosed.** *(Check payable in U.S. dollars to Family Office Exchange)*

Please mail check and this registration form to:
Family Office Exchange
ATTN: Events
100 South Wacker Drive, Suite 800, Chicago, IL 60606

❍ **To pay by credit card** please call the Events Team directly at 1.312.327.1221 and provide credit card details. Note: credit card payments over $7,500.00 are subject to a 3.5% fee on the entire payment.

❍ **I am paying by wire transfer**
Pay by wire transfer and fax this registration form to Family Office Exchange at 1.312.327.1212. Please reference your company name on the wire transfer and account for any transfer fees. Date payment is to be made:____________________

Wire Transfer Instructions:
Bank Name: US Bank, NA | ABA Number: 071904779 | Account Number: 199355839887
Account Name: Family Office Exchange

Family Office Exchange is not liable for additional fees and/or foreign exchange rate adjustments incurred by the payer.

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 1.312.327.1200.