

FOX Rising Gen™

Connecting You with Your Community

April 20-21, 2018 | Loews Chicago Hotel | Chicago, IL



Popular wisdom says that money solves everything. But the truth is that living with family wealth is complicated. As the family tree starts to branch out, it gets more complicated. The good news is that while you and your family are unique, you are not alone.

Family Office Exchange (FOX) is creating a new community for members of the Rising Generation to help connect you with people, like yourself, who are next generation members of financial families in their 20s, 30s, and 40s, and are facing similar challenges and similar opportunities.

The **FOX Rising Gen™** is not a social club, but an opportunity to expand your knowledge about the things you want to learn about family wealth as it applies to your life. It is an opportunity for learning and discovery. We expect that you will form lasting relationships with people who are uniquely able to understand your point of view and that you will have fun with in the process.

In addition to connecting you with close peers, FOX brings to the table 25 years of experience, a rich content library, and relationships with a broad network of experts.

For our inaugural meeting on Friday evening of April 20 and Saturday, April 21, we have [prepared an agenda](#) based on input from our advisory board of Rising Generation family members.

If all this sounds good to you, we hope to see you in Chicago for the inaugural meeting of the FOX Rising Generation. We look forward to meeting you and seeing the **FOX Rising Gen** take shape. You will leave with a network of people like yourself and a number of insights into issues you have probably been thinking about.

Spouses, partners, and significant others are encouraged to register as an integral part of the program.

FOX Rising Gen Advisory Board



Hillary Elmore Cage
Elmore Companies



Caroline Harrison
Advisor
LSH Advisory Board



Ian MacNaughton
CEO and Managing Partner
The MacNaughton Group



Austin McDonald
President and COO
McDonald Development Company

Guest Presenters



Jill Shipley
Family Education Expert
Managing Director, Abbot Downing



Rena Greifinger
Design Thinking and Philanthropy Expert
Senior Project Lead, MaverickNEXT



Whitney Webb
Education Advisor
Launch-Generation

FOX Moderator



Heather Abramson
Senior Relationship Manager

Friday, April 20, 2018

6:30 pm Kick-Off Dinner Reception at AceBounce Chicago

AceBounce is a ping pong playground with award winning chefs and mixologists. Join us for this casual warm up to the Rising Gen!

Shuttle service will be provided from the Loews Chicago.



• THE HOME OF PING PONG •



Venue and Hotel Accommodations



Loews Chicago Hotel

455 North Park Drive
Chicago, Illinois, 60611

1.312.840.6660

<https://www.loewshotels.com/chicago-downtown>

FOX has reserved a limited number of rooms at the Loews Chicago Hotel at a rate of \$234 per night plus applicable taxes. To obtain this discounted rate, please contact the Loews Chicago Hotel directly at **1.877.868.8232** and mention the **FOX Global Owners Forum**. You may also book rooms online via the FOX website at www.familyoffice.com/FG.

Forum attendees are responsible for making their own accommodation arrangements. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is **Friday, March 23, 2018**.

8:00 am Breakfast and Registration

8:45 am Opening Remarks

Led by: Heather Abramson, Senior Relationship Manager

As we convene for our first Rising Gen learning program, we'll share the inspiration behind our gathering and our expectations for how this community will come together to support each other's aspirations and challenges.

9:00 am My Story

Led by: Jill Shipley, Family Education Expert

Joined by FOX Rising Gen Members

Sustaining wealth, a family office or a business is difficult and the odds are stacked against us. This interactive discussion focuses on stories from peers about their experiences working in the shadow of a successful parent, running a family office, and shouldering the fulfilling (yet sometimes heavy) responsibility of being a steward for future generations.

10:00 am Morning Networking Break

10:30 am Money and Relationships

Led by: Jill Shipley, Family Education Expert

Let's be honest — there's a stigma that surrounds being an inheritor or trust fund beneficiary, landing a leadership role in a successful family business, or generating wealth at a young age. Assumptions, biases, and perceptions impact the way we are treated and how we treat others. This session will focus on how to navigate other people's opinions, behaviors, and questions — whether it be friends, significant others, co-workers, family, or even a stranger at a cocktail party.

12:00 pm Luncheon

1:00 pm Polling Game to Build Future Rising Gen Programs

Led by: Whitney Webb, Education Advisor

Contribute to future learning programs as we utilize a live, on-screen polling survey to gauge interest in various hot topics and issues that we can cover with the Rising Gen community.

1:15 pm Rising Gen Roundtables

Facilitated by FOX and Guest Learning Experts

Participants will choose which topic they would like to take part in and join in facilitated discussions and case studies. Topics may include, but are not limited to the following: *Dynamics with the Family Business*, *Managing Generational Differences*, *Sibling/Cousin Concerns*, *Spouse/In-law's Involvement*, and *Next Gen Preparation for Leadership*.

2:30 pm Afternoon Networking Break

3:00 pm Unlock New Philanthropic Solutions Through Design Thinking

Led by: Rena Greifinger, Design Thinking and Philanthropy Expert

Design thinking is a process that facilitates identifying the right problem, applying the right resources, creating the right solution, and getting the right results. This highly accessible, agile methodology was first used by the private sector to efficiently and effectively develop products and services that meet human needs. More recently, it has been applied to social problems and has empowered philanthropists to maximize their impact.

In this interactive session, we will explore together how we can use design thinking to create cutting-edge, highly effective initiatives, and feel a greater sense of participation, alignment, and philanthropic impact. As our guide, Rena Greifinger will be drawing upon real life examples from her work with PSI's MaverickNEXT, a philanthropic organization supported by the Bill and Melinda Gates Foundation.

4:30 pm Adjournment and Reception

Attendees of the FOX Rising Gen™ are invited to join us for the
FOX Global Owners Forum™
immediately prior to this event on April 19-20, additional fees apply.



Registration Questions

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

Please select your age range:

20s 30s 40s

If you are a Family Leader/Member please select your generation:

Gen 1 Gen 2 Gen 3 Gen 4 Gen 5
 Unknown Not Applicable

I play an active role in the family business:

Yes No Preparing to

What is your primary role within your family?

(Please select all that apply)

Matriarch/Patriarch Board Member
 Senior Manager of family business
 Senior Manager of family office
 Foundation Board Member Other

I am most interested in the following roundtable discussion topics:

Dynamics within the family business
 Managing generational differences
 Sibling/Cousins concerns
 Spouse/In-law's involvement
 Rising Gen leadership prep
 Other

My biggest challenge as a member of the rising generation is

The main reason I have chosen to attend this event is

I plan to attend:

The Rising Gen Opening Dinner event at AceBounce Chicago, Friday April 20
 Breakfast on Saturday, April 21
 Luncheon on Saturday, April 21
 Reception on Saturday, April 21

Would you be interested in joining your fellow attendees at a split-check/dutch treat dinner following the reception on Saturday, April 21?

Yes No

Would you like us to reach out to any of your family members or peers regarding either the Global Owner's Forum and or the FOX Rising Gen?

Rising Gen Global Owners Forum Both

First Name

Last Name

Email Address

Questions?

Contact us at events@familyoffice.com or call 312.327.1221

Three Ways To Register

1. Scan and email to:

events@familyoffice.com

2. Register online at:

www.familyoffice.com/RG

3. Fax this form to:

1.312.327.1212

Attendee Information

Name (First/Last)

Name of Firm/Family Office

Title/Position

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

E-mail

Do you have any special dietary or accessibility needs? (please describe)

Registration Options

Attend the FOX Rising Gen™

FOX Members

Use Event Credit Included in FOX Membership Fee

FOX Members

\$950

Non-Members

\$950

Attend the FOX Global Owners Forum™ and FOX Rising Gen™

FOX Members

Use Event Credit Included in FOX Membership Fee

FOX Member

\$3,550

Additional Paid Attendees
 \$3,100

Non Member

\$4,100

Additional Paid Attendees
 \$3,650

If you are also registering for the Global Owners Forum, please complete these additional questions.

Are you active in direct investments? If yes, please list industries:

Yes No

Please select up to 3 collaborative learning discussion topics that interest you as part of the families of impact session?

Impact Investing Impact Philanthropy Impact Business
 Impact Evaluation Next Gen Engagement and Leadership
 Rising Gen Entrepreneurship Using Your Time and Voice for Impact

What is your most urgent family learning issue?

Will you attend the following:

Luncheon on Thursday, April 19
 Forum Reception and Dinner on Thursday, April 19
 Breakfast on Friday, April 20
 Luncheon on Friday, April 20

How would you like to receive your forum materials?

(Additional binders will not be available at the event.)

I would like to download the materials in advance and will NOT need a binder.
 I would like to receive materials in a binder at the forum.

Payment Method

Payment by check is enclosed.

(Check payable in U.S. dollars to Family Office Exchange)

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.

For event registrations, refunds of payment or forum allotments 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.