

# FOX RISING GEN LEADERSHIP PROGRAM



SAPPHIRE EDITION

DECEMBER 7-8, 2020 | CHICAGO, IL



# 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. The multi-part learning series is focused on educating future family leaders so they are armed with the skills needed to thrive in life, business, and wealth stewardship. Participants will attend educational sessions and engage in peer networking and experiential activities.

This education program is a multi-disciplinary approach that will cover four diverse subject areas needed to be an equipped, informed, and contributing leader to the family enterprise. These courses are the essential building blocks for family leadership preparation, and part of an overall core curriculum that will be presented at four distinct FOX Rising Gen Leadership Programs.

Participants in the program will obtain knowledge as they pursue their careers and increased credibility within the family.

Additionally, interacting with a peer community will allow Rising Generation family members to have honest and informative conversations addressing their unique questions related to family, business, and leadership.

For 30 years FOX has been sharing experiences, education, and guidance with families, family office executives, and advisors. FOX is delighted to present this important program series to empower future family leaders and equip them with a leadership toolkit for the future.

## 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.



### TOPAZ EDITION

Personal Skills Inventory and Assessments

Effective Communication in a Family Setting

Family Leadership Skills

Shared Ownership and Governance

What Goes on in the Boardroom?



### SAPPHIRE EDITION

Living an Authentic Life with Purpose

Modern Families: Inclusiveness and Spousal Roles

Influence without Authority

Managing Change and Decision-Making in your Family



### EMERALD EDITION

Meaningful Relationships and Family Boundaries

Building Trust and Negotiating Skills

Consensus Building

Preparation, Behavior, and Best Practices in the Boardroom



### RUBY EDITION

Your Relationship with Money

Personal and Family Philanthropy

Conflict Resolution

Managing Change and Role Definitions



# AGENDA

## DAY 1 AGENDA: Monday, December 7

9:00 AM	Registration and Breakfast
9:30 AM	Introduction and Networking Activity <b>LIVING AN AUTHENTIC LIFE WITH PURPOSE</b>
12:30 PM	Lunch
1:15 PM	<b>MODERN FAMILIES: INCLUSIVENESS AND SPOUSAL ROLES</b> Case Studies and Discussion Personal Reflection
4:30 PM	Meeting Adjournment
6:00 PM	Cocktail Reception & Dinner

## DAY 2 AGENDA: Tuesday, December 8

9:00 AM	Breakfast
9:30 AM	Reflections and Activity <b>INFLUENCE WITHOUT AUTHORITY</b>
12:00 PM	Lunch
1:00 PM	Practical Application <b>MANAGING CHANGE AND DECISION- MAKING IN YOUR FAMILY</b>
4:15 PM	Final Reflection
4:30 PM	Meeting Adjournment



# CORE CURRICULUM & COURSE DESCRIPTIONS

## **LIVING AN AUTHENTIC LIFE WITH PURPOSE**

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.

## **MODERN FAMILIES: INCLUSIVENESS AND SPOUSAL ROLES**

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.

## **INFLUENCE WITHOUT AUTHORITY**

Be it committee participation or observing board meetings, as a Rising Generation family member, you have an opportunity to influence decisions and discussions. This module will examine ways in which you can offer insights, ask questions, or guide discussions without having formal authority. We will consider frameworks to evaluate what type of participation is called for in different settings, help you determine when and how to exercise your influence as a family member in a larger dialogue, and explore being mindful of the hierarchy within your family's governance structure.

## **MANAGING CHANGE AND DECISION-MAKING IN YOUR FAMILY**

Over time, families grow and change. There are additions of new family members, the passing of leadership from one generation to another, the acquisition or dissolution of new businesses or investments. Change is a constant. Learning how to navigate that change as a family, and to make effective decisions in the face of shifting priorities, is essential for family members. This session will help you analyze your current decision-making model and align your family around the right priorities to make decisions in a timely manner.



## 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.





# LOCATION

## PROGRAM VENUE

Convene

16 W Adams St

Chicago, IL 60603



**FIELD OF STUDY:** Finance | 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 Live Program

**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](http://www.NASBARegistry.org).*



# PROGRAM REGISTRATION

## 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)

### Will you attend the following meals on December 7?

☐ Breakfast ☐ Lunch  
☐ Cocktail Reception & Dinner

### Will you attend the following meals on December 8?

☐ Breakfast ☐ Lunch

## QUESTIONS?

Contact us at [events@familyoffice.com](mailto:events@familyoffice.com) or call 312.327.1221

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 arriving.

## THREE WAYS TO REGISTER

1 Scan and email to:  
[events@familyoffice.com](mailto:events@familyoffice.com)

2 Register online at:  
[www.familyoffice.com/RGLPDEC](http://www.familyoffice.com/RGLPDEC)

3 Fax this form to:  
[1.312.327.1212](tel:13123271212)

Space is limited. All attendees must register online or submit this registration form prior to the event to secure a seat.

## ATTENDEE INFORMATION:

Select information will be used for your badge, including city and state.

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 dietary or special needs?

## REGISTRATION FEES

### FOX Member

First Paid Attendee

☐ \$3,900

Additional Paid Attendees

☐ \$3,500

### FOX Non-Member\*

First Paid Attendee

☐ \$4,875

Additional Paid Attendees

☐ \$4,375

A family group discount is available, please contact us for details.

\*If you are not a member of Family Office Exchange, please contact [info@familyoffice.com](mailto:info@familyoffice.com) for membership information.

## PAYMENT METHOD

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

Please mail check and Family Office Exchange  
this registration form to: 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 or register online at [www.familyoffice.com/RGLPDEC](http://www.familyoffice.com/RGLPDEC)  
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 will be offered if the cancellation is made in writing to Family Office Exchange at [events@familyoffice.com](mailto: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.