

FOX Financial Executives Forum

In Pursuit of the Well-Run Family Office

July 18-19, 2012 • Chicago



The FOX Financial Executives Forum is where financial executives meet for an annual update on industry developments and best practices. It's the place to stay sharp and ensure that your office is delivering service and advice that is the best for your family clients.

Recommended for: Single and multi-family office executives and family leaders

Location: Four Seasons, Chicago

WEDNESDAY, JULY 18

5:30 p.m. Registration

6:00 p.m. Welcome Reception

THURSDAY, JULY 19

7:30 a.m. Registration and Continental Breakfast

8:30 a.m. Welcome

Mariann Mihailidis, Family Office Exchange

8:45 a.m. Tax and Estate Planning Update

Susan von Hermann, Schiff Hardin

The two-year window is closing on opportunities for families to capitalize on gift, estate, and generation-skipping tax provisions of the 2010 Tax Act. Hear from an estate planning expert what wealth owners can expect from lawmakers in the coming year and how best to prepare for the changes in tax law that lie ahead.

9:45 a.m. Legislative Updates From Our Nation's Capitol

Jeff Cook, Policy and Taxation Group

What are the latest political and legislative developments and what do families need to be aware of as we stand poised for an election year? This always popular update on action on Capitol Hill will give family office executives the information they need to know to be prepared for 2012 and beyond.

10:30 a.m. Break

10:45 a.m. FOX Update

11:15 a.m. Business Continuity in the World of Technology

*Jeremy Kahn, AVP, Information Technology,
Hartz Mountain Industries*

Learn the latest information about migrating to cloud-based computing technology and disaster recovery programs to ensure that your family office will be able to continue to operate efficiently and effectively during a crisis.

12:30 p.m. Lunch

1:30 p.m. Financial Executive Dialogue

One of the most valuable aspects of the Forum is the opportunity to meet other financial executives. In these breakout sessions, FOX experts lead peer group discussions of issues surrounding the greatest concerns to family offices. Participants may choose from the following topics:

- Business Continuity
- Human Resources
- Family Continuity
- MFO/Thought Leaders Council Peer Discussion

2:45 p.m. Break

3:00 p.m. Going Beyond the Traditional Quarterly Financial Report

Heather Asher, Family Office Exchange

Robert O'Boyle, Advent Software, Inc.

Creating effective reports that are broadly consumed across the family and encourage, rather than distract, family members from their long-term goals is extremely challenging. In some cases, the key challenges center on differences in financial education and interpretation abilities among different members of the same family. In other cases, there are issues around formatting and preferences in how reports and information are provided (paper versus electronic). In this session, the panel will discuss approaches to reporting that promote readership, prompt broader family involvement and engagement, and ultimately help family members remain focused on their long-term goals.

4:00 p.m. Human Resource Challenges

Join in the discussion with an HR professional from a SFO and MFO office that will provide insight into issues that family offices have the most interest in, such as: hiring talent, retention, salary/raises, flextime, conflict and many more. Walk away from this session with some answers on how to further your definition of a well-run family office through the personnel that operate it.

5:00 p.m. Closing Remarks

5:15 p.m. Adjournment

FOX Financial Executives Forum

July 18-19, 2012 • Chicago, IL



Registration

Four ways to register:

1. **Scan and email** to
events@familyoffice.com
2. **Fax this form** with credit card
information to 1.312.327.1212
3. **Mail this form** with a check to:
Family Office Exchange
100 South Wacker Drive
Suite 900
Chicago, Illinois 60606
4. **Register online (members only)**
at www.familyoffice.com

Hotel Information



Four Seasons Chicago
120 East Delaware Place
Chicago, IL 60611
1.312.280.8800

FOX has reserved rooms at the Four Seasons Chicago at a rate of \$275. To obtain the special rate, contact reservations directly at 1.312.280.8800 and mention Family Office Exchange. Please note that Forum attendees are responsible for making their own hotel reservations.

Book online at: <http://www.fourseasons.com/chicagofs> and select the dates under the red "Make Your Reservation" icon. Enter this 6-digit code under the "Corporate/Promo Code" section. Code: FO0717

Sessions

Please select the sessions you plan to attend:

- ☐ I will attend the welcome reception on July 18

Select the peer dialogue session topic you wish to attend:

- ☐ Business Continuity
☐ HR Issues
☐ Family Continuity
☐ MFO/Thought Leaders Council

Refund Policy

All cancellations must be made in writing to Family Office Exchange. Refunds minus a fee of \$500 will be allowed on cancellations on or before 30 days prior to workshop. For cancellations between 30 days and 10 days refunds minus a fee of \$1,000 will be allowed. No refunds will be offered after 10 days before the workshop date.

Questions?

Contact Events at 1.312.327.1252 or events@familyoffice.com.

Forum Participant

Name (First/Last)

Name as you would like it to appear on your badge

Family/Firm Name

Title/Position

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

Fax

E-mail

Special Dietary/Accessibility Needs

☐ I am a first-time attendee

Registration Fee

Space is limited; all attendees must submit a registration form to ensure a seat.

- ☐ Registration fee included in membership
- ☐ First paid attendee: **\$1,295**
- ☐ Second paid attendee: **\$1,035 (20% discount)**
- ☐ Non member fee: **\$1,550**
- ☐ Additional attendees: **\$1,295 (20% discount)**

Payment Method

- ☐ Payment by check is enclosed
(Check payable in U.S. dollars to Family Office Exchange)
- ☐ Please charge the following credit card:
☐ VISA ☐ MasterCard ☐ American Express
- ☐ I would like printed materials
- ☐ I would like to download materials electronically

Cardholder Name

Card Number

Expiration Date

3 Digit Code (back of card)

Billing Address for Credit Card

City

State/Province

Zip/Postal Code

Country

Cardholder's Signature