



2015 FOX Financial Executives Forum

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Thank you for taking a few minutes to evaluate the 2015 FOX Financial Executives Forum. Your feedback will help us provide better programming at future FOX events.

Are you a FOX member?

- Yes
- No

If so, what type of FOX member are you?

- Thought Leader Council Member
- Family Office Member
- Family Office Council Member
- Multi-Family Office Council Member
- Wealth Advisor Council Member
- Advisor Member

What were your objectives for attending this event? (check all that apply)

- Professional Education
- Networking
- Connect with peers
- Meet with Technology Solution Providers
- All of the above
- Other _____

How well were your goals/objectives met?

- Far exceeded expectations
- Exceeded expectations
- Equaled expectations
- Short of expectations
- Far short of expectations

Please rate your overall experience:

- Excellent
- Very Good
- Good
- Fair
- Poor

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Please evaluate the following items

	Excellent	Very Good	Good	Fair	Poor	NA
Overall quality of the presenters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
FOX staff service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Event organization on-site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Convenience of the date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Length of forum	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Swissotel as the event venue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Registration prior to program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How likely are you to recommend the event to others?

- Very Likely
- Likely
- Somewhat Likely
- Unlikely
- Very Unlikely



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Please evaluate the following session/speakers: Transforming Data Into Intelligence

	Excellent	Very Good	Good	Fair	Poor	NA
Content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Moderator: David Barrickman	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Panelist: Craig Cook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Panelist: Steve Feather	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Did you attend a technology demonstration?

- Yes
- No

Please evaluate the technology demonstration(s) you attended?

	Excellent	Very Good	Good	Fair	Poor	NA
Addepar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backstop Solutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
External IT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
FundCount	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Netage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Northern Trust	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Client Resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SS&C	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trusted Family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Do you intend to follow up with the technology provider whose demonstration you attended?

- Yes
- No
- Not sure



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Please evaluate the peer dialogue you attended:

	Excellent	Very Good	Good	Fair	Poor	NA
Small Office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medium Office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Large Office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MFO/Thought Leaders/WAC	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology Providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please evaluate the following session/speakers: Legislative Updates From Our Nation's Capitol

	Excellent	Very Good	Good	Fair	Poor	NA
Content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Tyler Deaton	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker: Jake F. Seher	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What topics or speakers would you like to hear at future forums?

Please provide any suggestions that you feel would improve the overall quality and appeal of this event.

Would you like to receive CPE credit? If so, please provide your contact information below.

- Yes
- No

Please provide your contact information

First Name	
Last Name	
Company	
Phone	
Email	

If you were to recommend this forum to another family or firm, what would you say?