

### 2015 FOX Financial Executives Forum

Are you a FOX member?

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.

O	Yes
$\mathbf{O}$	No
O O O O	Thought Leader Council Member Family Office Member Family Office Council Member Multi-Family Office Council Member Wealth Advisor Council Member Advisor Member
	nat 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
$\circ$	w well were your goals/objectives met? Far exceeded expectations Exceeded expectations Equaled expectations Short of expectations Far short of expectations
Ple	ease rate your overall experience:
	Excellent
	Very Good
	Good Fair
	Poor
•	1 001



## Please evaluate the following items

	Excellent	Very Good	Good	Fair	Poor	NA
Overall quality of the presenters	•	0	•	0	0	•
FOX staff service	•	•	•	•	•	O
Event organization on-site	•	0	•	•	•	•
Convenience of the date	•	•	•	•	•	0
Length of forum	•	•	•	•	•	O
Swissotel as the event venue	•	0	•	•	•	0
Registration prior to program	•	0	•	•	•	•

How likely are you to recommend the event to others?

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



# Please evaluate the following sessions/speakers for Tuesday, July 21, 2015

Please evaluate the following session/speakers: The 5 Technology Adoption Methods: Build, Upgrade, License, Outsource or Hybrid – Which One is Right For You?

	Excellent	Very Good	Good	Fair	Poor	NA
Content	0	0	•	•	0	0
Topic	O	•	•	•	•	O
Moderator: Steve Draper	•	0	•	•	•	•
Panelist: Jason Brown	•	•	•	•	•	•
Panelist: Kevin Bormann	•	•	•	•	•	•
Panelist: Eileen M. Friestad	0	0	•	•	•	•

Please evaluate the following session/speakers: Case Study: Evaluating and Remediation of Technology Risks in a Family Office

	Excellent	Very Good	Good	Fair	Poor	NA
Content	•	0	0	•	0	0
Topic	•	<b>O</b>	•	•	•	O
Speaker: Greg Johnson	•	•	•	•	•	•
Speaker: Julie McKinley	•	•	•	•	•	•



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

	Excellent	Very Good	Good	Fair	Poor	NA
Content	O	•	0	0	0	0
Topic	•	•	•	•	•	O
Moderator: David Barrickman	•	•	•	•	•	•
Panelist: Craig Cook	<b>O</b>	<b>O</b>	<b>O</b>	<b>O</b>	<b>O</b>	0
Panelist: Steve Feather	•	•	•	•	•	0

Did you attend a technology demonstration	d a technology demonstration?
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- O Yes
- oN C

Please evaluate the technology demonstration(s) you attended?

	Excellent	Very Good	Good	Fair	Poor	NA
Addepar	0	0	•	•	•	0
Backstop Solutions	•	•	•	•	•	0
External IT	•	<b>O</b>	•	•	•	O
FundCount	<b>O</b>	O .	•	•	•	O
Netage	O	O	•	•	•	O
Northern Trust	•	•	•	•	•	0
Private Client Resources	•	•	•	•	•	0
SS&C	O	O	O	<b>O</b>	<b>O</b>	O
Trusted Family	0	•	•	0	0	0

$D_{\alpha}$	you intend to	follow up	with the t	tachnalagy	providor	whoso	demonstration	vou attended?
טט י	you iiil <del>e</del> iiu lo	nollow up	WILLI LITE	t <del>e</del> chilology	provider	MIIOSE	u <del>c</del> inonstration	you allended:

- O Yes
- O No
- O Not sure



If you do not intend to follow up, please tell us why

Please evaluate the following peer dialogue by topic session/speakers: Human Capital Network

	Excellent	Very Good	Good	Fair	Poor	NA
Content	0	0	•	0	0	0
Topic	O	O	•	•	•	•
Facilitator: Kelley Ahuja	•	•	•	•	•	<b>o</b>

Please evaluate the following peer dialogue by topic session/speakers: Technology Operations & Data Security Network

	Excellent	Very Good	Good	Fair	Poor	NA
Content	O	0	0	0	0	0
Topic	•	O	•	•	•	O
Facilitator: Steve Draper	•	0	•	•	•	•

## Please evaluate the following sessions/speakers for Wednesday, July 22

Please evaluate the following session/speakers: Tax and Estate Update

	Excellent	Very Good	Good	Fair	Poor	NA
Content	0	0	•	•	•	0
Topic	O	<b>O</b>	•	•	•	O
Speaker: Mark Harder	•	•	•	•	•	•
Speaker: Brittney Saks	•	•	•	•	•	•



Please evaluate the peer dialogue you attended:

	Excellent	Very Good	Good	Fair	Poor	NA
Small Office	•	0	0	•	0	O
Medium Office	•	•	•	•	•	•
Large Office	O	O	•	O	•	O
MFO/Thought Leaders/WAC	•	•	O	•	•	•
Technology Providers	•	<b>O</b>	O	O	O	O

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

	Excellent	Very Good	Good	Fair	Poor	NA
Content	0	0	•	•	•	0
Topic	O	<b>O</b>	•	•	•	O
Speaker: Tyler Deaton	•	•	•	•	•	•
Speaker: Jake F. Seher	•	•	•	•	•	0

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, p	lease p	orovide	your c	ontact	: informa	tion	bel	OW.
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- O Yes
- O No

Please provide your contact information

First Name	
Last Name	
Company	
Phone	
Email	

If y	ou were to	recommend this	forum to	another fa	amily or	firm, wha	at would	you sa	у?
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