2013 FOX Member Events - Global

As of April 19, 2013

Family Office Exchange®

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Forums*				**Wealth Advisor Forum** April 30 - May 2 Miami			**FOX Financial Executives Forum** Jul 17-18 Chicago			**FOX Fall Forum** Oct 28-30 Chicago		
FOX Educational Programs and Workshops*		**Family Business Roundtable** Feb 25 Chicago		CHICAGO BOOTH **Private Wealth Management** Apr 22-26 Chicago **Family Leadership Succession I** Apr 22-23 Chicago	**Family Office Best Practices Workshop** May 13-14 Chicago	**Grantors, Trustees and Beneficiaries** Jun 4-5 Chicago			**Family Leadership Succession II** September 9-10 Chicago	CHICAGO BOOTH **Private Wealth Management** Oct 7-11 Chicago	**Grantors, Trustees and Beneficiaries** Nov 19-20 Dallas	
Webinars*	**Protection of Fine Art Collections** Jan 9 **Tax and Regulatory Teleconference** Jan 22 **2013 Estate Planning Update** Jan 30	**Leadership Succession** Feb 6 **Custody and Agreements** Feb 13	**Family Office Roles and Responsibilities** Mar 6 **Technology and Integrated Reporting** Mar 20	**Understanding the Global Investor** Apr 3 **Cyber Security** Apr 17	**Replenish the Well Using Life Insurance** May 15 **TBD** May 29	**TBD** Jun 19	**TBD** Jul 10	**TBD** Aug 14	**TBD** Sep 11 **TBD** Sep 25	**TBD** Oct 9 **TBD** Oct 23	**TBD** Nov 6 **TBD** Nov 20	**TBD** Dec 4 **TBD** Dec 11
Councils	**Investment Council** Jan 21-22 NYC **Business Owner Council** Jan 31-Feb 1 Orlando	**Sr. Management Council** Feb 28-Mar1 Las Vegas	**Financial Executive Council** Mar 3-4 Scottsdale **U.S. MFO Council** Mar 5 NYC **Executive Council** Mar 19-20 NYC **Global Family Council** Mar 21-22 London		**Investment Council** May 8-9 NYC **Owner/Operator Council** May 21-22 Lake Tahoe		**Financial Executive Council** Jul 16-17 Chicago **Thought Leader Summit** Jul 16-17 Chicago	**Business Owner Council** Aug 26-27	**Executive Council** Sep 11-12 **Sr. Management Council** Sep 17-18 **Global Family Council** Sep 24-25	**Investment Council** Oct 1-2 NYC	**Owner/Operator Council** Nov 13-14 Pasadena	
Roundtables			**Family Office Roundtable** Mar 20 London **Multi Family Office Roundtable** Mar 20 London			**Family Office Roundtable** Jun Australia	**Family Office Roundtable** Jul London		**Family Office Roundtable** Sep Germany		**Family Office Roundtable** Nov Australia	

*Eligible for CPE credit

Dates Subject to Change

2013 FOX Member Events - Global

As of April 19, 2013

Family Office Exchange

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Wealth Advisor Briefings											
		Wealth Advisor Briefing Mar 6 NYC			**Wealth Advisor Briefing** Jun 25 Chicago	**Wealth Advisor Briefing** Jul 25 San Francisco		**Wealth Advisor Briefing** Sep 10 Philadelphia	**Wealth Advisor Briefing** Oct 3 Dallas	**Wealth Advisor Briefing** Nov 13 NYC	
Regional Member Briefings											
	FOX/FDX Roundtable Feb 26 Miami	**FOX/FDX Roundtable** Mar 20 Southern California		**FOX/FDX Roundtable** May 1 Dallas	**FOX All-Member Networking Event** Jun 6 NYC	**FOX/FDX Roundtable** Jul 24 San Francisco		**FOX/FDX Roundtable** Sep 10 Minneapolis	**Regional Member Briefing** Oct 2 Dallas	**Regional Member Briefing** Nov 14 NYC	
					Regional Member Briefing Jun 11 NYC			**FOX All-Member Networking Event** Sep 19 Chicago			
					FOX/FDX Roundtable Jun 20 Chicago						
					Regional Member Briefing Jun 27 Chicago						

**Eligible for CPE credit*

Dates Subject to Change

Family Office Exchange®

Save the Date

2013 FOX Fall Forum

Chicago, IL
October 28-30, 2013

The FOX Fall Forum is our premier conference, open to all FOX members and by invitation to select individuals who are not members. Held annually in Chicago, the FOX Fall Forum provides an opportunity for wealth owners, family office professionals and wealth advisors to hear from the industry leaders on current trends and meet in peer groups to discuss practical solutions to challenges they face.

Visit www.familyoffice.com for more information.

Family Office Exchange®

2013 Educational Workshop Offerings

Family Office Design and Best Practices Workshop
May 13 – 14
Chicago, IL

**Grantors, Trustees and Beneficiaries:
A New Look at Roles and Responsibilities**
June 4 – 5
Chicago, IL

**Family Leadership Succession Workshop II:
Making Progress on Succession Planning**
September 9 – 10
Chicago, IL

**Grantors, Trustee and Beneficiaries:
A New Look at Roles and Responsibilities**
November 19 – 20
Dallas, TX

FOX Advisor Benefits

- Your clients can take advantage of FOX member pricing
- As a trusted advisor, you are welcome to family oriented workshops with your clients

Coupon Code: ADV2013
to get member pricing.

Family Office Design and Best Practices Workshop

May 13 – 14, 2013 • Chicago, IL

WORKSHOP DATES

May 13 – 14, 2013

LOCATION

The Gleacher Center
450 North Cityfront Plaza Drive
Chicago, IL 60611

ORGANIZER

Family Office Exchange

SPEAKERS

Karen Neal
Family Office Exchange

Charlie Grace
Family Office Exchange

AUDIENCE

- Executives new to a family office leadership role
- Individuals looking to formalize and professionalize their family office
- Newly liquid families

REGISTRATION FEE

FOX Members
$1,695 First Attendee
$1,350 Additional Attendee

Non-Members
$2,095 First Attendee
$1,695 Additional Attendee

QUESTIONS

312.327.1231
workshops@familyoffice.com

Designing your family office

Establishing a formal family office can be a daunting task. During this day and a half workshop, attendees will tailor their unique family situation to the family office blueprint. Through the development process, attendees will dive into the major elements of establishing a family office: goal setting, scope of services, investment guidelines and processes, operations, governance, and cost allocation.

Attendees of this workshop will learn to:

- Define the role of their family office
- Identify the service needs of the family office
- Discover the most effective service delivery methods
- Name the three critical components of the investment planning process
- Produce a process for measuring family office success

Agenda Overview

Monday, May 13

- Setting Goals and Determining the Roles and Responsibilities of the Family Office
- Scope of Services
- Investment Guidelines and Processes
- A Roadmap to Risk Management
- Family Office Case Study: Kent Lawson of Longview Asset Management
- Cocktail and Dinner Reception

Tuesday, May 14

- Allocation of Costs and Human Resources
- Ownership, Governance and Operating Structures
- Budget and Allocation of Costs

Sponsored by: AIG

More Information and Registration: Family Office Design and Best Practices Workshop

CPE *This Workshop is eligible for CPE credits.*

Grantors, Trustees and Beneficiaries: A New Look at Roles and Responsibilities

June 4 – 5, 2013 • Chicago, IL

WORKSHOP DATES
June 4 – 5, 2013

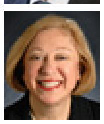
LOCATION
The Gleacher Center
450 North Cityfront Plaza Drive
Chicago, IL 60611

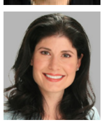
ORGANIZER
Family Office Exchange

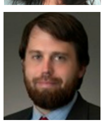
SPEAKER


Lee Hausner
First Foundation Advisors


Paul Lee
Bernstein Global Wealth Management


Mariann Mihailidis
Family Office Exchange


Kim Kamin
Schiff Hardin LLP


William Sanderson
McGuireWoods LLP

Including experts in the areas of
Legal
Trust administration

AUDIENCE
- Grantors selecting a trustee
- Beneficiaries becoming part of a trust
- Trustees serving as day to day administrators

REGISTRATION FEE
FOX Members
$1,695 First Attendee
$1,350 Additional Attendee

Non-Members
$2,095 First Attendee
$1,695 Additional Attendee

The importance of trustee and beneficiary training

This day and half workshop will provide attendees a deeper understanding of the core trustee duties, skills and traits required to manage the personal demands and obligations of trusteeship. For grantors, choosing a trustee means selecting an individual or organization that has the expertise and emotional skills to carry out his or wishes. For beneficiaries, being part of trust means knowing the rights, roles and responsibilities of the beneficiary and the trustee and committing to a strong working relationship. Lastly, for trustees, accepting this duty demonstrates a willingness to serve as a day to day administrator and long-term advisor.

Attendees of this workshop will learn to:

- Name the duties of a trustee
- Recognize the importance of communication between trustees and beneficiaries
- Differentiate between mandatory and discretionary trusts
- Examine the evolution of fiduciary standards on trust assets
- State the liabilities of serving as a trustee

Workshop Agenda Overview

Tuesday, June 4

- Duties and Powers of the Trustee
- Educating the Beneficiary
- Distribution Provisions: Understanding the Issues and Options
- Understanding Prudent Investor Practices and the Prudent Investor Rule
- Fiduciary Risk and Litigation
- Cocktail and Dinner Reception

Wednesday, June 5

- Role Playing with Peers
- Selecting a Trustee: Five Steps to a Successful Relationship
- Trustee Best Practices

Dinner Sponsored by: MARSH

More Information and Registration: Grantors, Trustee and Beneficiaries

Questions? Call us at 312.327.1231 or email workshops@familyoffice.com.

CPE *This Workshop is eligible for CPE credits.*

Family Leadership Succession Workshop II: Making Progress on Succession Planning

September 9 – 10, 2013 • Chicago, IL

WORKSHOP DATES

September 9–10, 2013

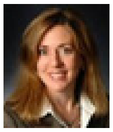
LOCATION

Family Office Excahnge
100 S. Wacker Dr. Suite 800
Chicago, IL 60606

ORGANIZER

Family Office Exchange

SPEAKERS



Karen Neal
Family Office Exchange

Margaret Vaughan Robinson
Family Office Exchange
MCV Consulting

AUDIENCE

Family enterprise leaders who attended the September 2012 and April 2013 offerings of the Family Leadership Succession Workshop

REGISTRATION FEE

FOX Members
$995 First Attendee
$795 Additional Attendee

Non-Members
$1,195 First Attendee
$995 Additional Attendee

QUESTIONS

312.327.1231
workshops@familyoffice.com

This one day workshop reunites attendees from the September 2012 and April 2013 offerings of the Family Leadership Succession Workshop. Attendees will discuss the progress they have made in developing and implementing their family leadership succession plans since attending the preliminary workshop. The workshop will also focus on topics pre-selected by attendees to refine their leadership succession plans and establish new milestones for their family enterprises.

Agenda Overview

Monday September 9th

The Development of Shared Goals
During this session, attendees will focus on the process of establishing shared goals within a family enterprise. Session facilitators will provide attendees with the tools to begin and maintain the process.

Cocktail and Dinner Reception

Tuesday, September 10th

Personal Leadership Development
During this session attendees will use a self-assessment tool to understand their strengths and opportunities for growth at personal and family enterprise levels. Attendees will use the results from the leadership assessment tool to hone in on their personal leadership skills and how it translates in helping the family enterprise attain their goals.

More Information and Registration: Family Leadership Succession: Making Progress on Succession Planning

CPE *This Workshop is eligible for CPE credits.*

Grantors, Trustees and Beneficiaries: A New Look at Roles and Responsibilities

November 19 – 20, 2013 • Dallas, TX

WORKSHOP DATES
November 19 – 20, 2013

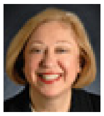
LOCATION
Dallas, TX

ORGANIZER
Family Office Exchange

SPEAKER


Lee Hausner
First Foundation Advisors


Paul Lee
Bernstein Global Wealth Management


Mariann Mihailidis
Family Office Exchange


Sarah Kerr Severson
Schiff Hardin LLP


William Sanderson
McGuireWoods LLP

Including experts in the areas of
Legal
Trust administration

AUDIENCE

- Grantors selecting a trustee
- Beneficiaries becoming part of a trust
- Trustees serving as day to day administrators

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$1,695 First Attendee
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$2,095 First Attendee
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The importance of trustee and beneficiary training

This day and half workshop will provide attendees a deeper understanding of the core trustee duties, skills and traits required to manage the personal demands and obligations of trusteeship. For grantors, choosing a trustee means selecting an individual or organization that has the expertise and emotional skills to carry out his or wishes. For beneficiaries, being part of trust means knowing the rights, roles and responsibilities of the beneficiary and the trustee and committing to a strong working relationship. Lastly, for trustees, accepting this duty demonstrates a willingness to serve as a day to day administrator and long-term advisor.

Attendees of this workshop will learn to:

- Name the duties of a trustee
- Recognize the importance of communication between trustees and beneficiaries
- Differentiate between mandatory and discretionary trusts
- Examine the evolution of fiduciary standards on trust assets
- State the liabilities of serving as a trustee

Workshop Agenda Overview

Tuesday, November 19

- Duties and Powers of the Trustee
- Educating the Beneficiary
- Distribution Provisions: Understanding the Issues and Options
- Understanding Prudent Investor Practices and the prudent investor Rule
- Fiduciary Risk and Litigation

Wednesday, November 20

- Role Playing with peers
- Selecting a Trustee: Five Steps to a successful Relationship
- Trustee Best Practices

More Information and Registration: Grantors, Trustee and Beneficiaries

Questions? Call us at 312.327.1231 or email workshops@familyoffice.com.

CPE *This Workshop is eligible for CPE credits.*

Workshop Registration Form

Family Office Exchange

Four ways to register:

1. Scan and email to
workshops@familyoffice.com

2. Fax this form with credit card information to 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
at www.familyoffice.com/workshops

Refund Policy

All cancellations must be made in writing to Family Office Exchange. Registration payments will be refunded if written notice is received more than five business days before the event.

Questions

312.327.1231
workshops@familyoffice.com

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

Name (First/Last)

Family Name and Family Office Firm Name

Title/Position

Street Address

City State/Province

Country Zip/Postal Code

Phone

E-mail

Special Dietary/Accessibility Needs

How did you hear about this workshop? (Please provide name of firm if referred)

FOX Advisor Benefits

- Your clients can take advantage of FOX member pricing
- As a trusted advisor, you are welcome to family oriented workshops with your clients

Coupon Code: ADV2013 to get member pricing.

Workshop Attending	FOX Member First Paid Attendee	FOX Member Additional Member	Non-Member First Paid Attendee	Non-Member Additional Member
❍ **Family Office Design and Best Practices Workshop**	❑ **$1,695**	❑ **$1,350**	❑ **$2,095**	❑ **$1,695**
❍ **Grantors, Trustees and Beneficiaries – Jun**	❑ **$1,695**	❑ **$1,350**	❑ **$2,095**	❑ **$1,695**
❍ **Family Leadership Succession Workshop II**	❑ **$995**	❑ **$795**	❑ **$1,195**	❑ **$995**
❍ **Grantors, Trustees and Beneficiaries – Nov**	❑ **$1,695**	❑ **$1,350**	❑ **$2,095**	❑ **$1,695**

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

Cardholder Name

Card Number Expiration Date Security Code

Billing Address for Credit Card

City State/Province Zip/Postal Code Country

Cardholder's Signature

100 South Wacker Drive, Suite 800 ▪ Chicago, IL 60606 USA
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London WC2N 6AA ▪ United Kingdom
T: 44 (0)207 520 9443 ▪ F: 44 (0)207 520 9441

info@familyoffice.com ▪ www.familyoffice.com

Save the Dates

Wealth Advisor Briefings & Networking Events

All Member Networking Event
Date: June 6, 2013
Location: New York
Time: 6:00 p.m. EST

Wealth Advisor Briefings
Date: June 25, 2013
Location: Chicago
Time: 8:30 a.m. -10:00 a.m. CST

Date: July 25, 2013
Location: San Francisco
Time: 8:30 a.m. -10:00 a.m. PST

Date: September 10, 2013
Location: Philadelphia
Time: 8:30 a.m. -10:00 a.m. EST

Date: October 3, 2013
Location: Dallas
Time: 8:30 a.m. -10:00 a.m. CST

Date: November 13, 2013
Location: New York
Time: 8:30 a.m. -10:00 a.m. EST

Wealth Advisor Briefing Agenda

8:30 – 9:00 AM – Networking Breakfast

9:00 – 10:00 AM – Introductions and Peer Discussion

To register:
- Log into www.familyoffice.com with your member ID and Password
- Navigate to Learning Events, then Regional Meetings
- Register on the individual event page

Critical Insights on Running a Leading Wealth Advisory Firm

Family Office Exchange®

Building a World-Class Wealth Advisory Firm

FOX has been actively fostering the development of the multi-family office advisor segment as an alternative to families creating their own single family offices. To support the industry, FOX embarked on an ambitious research program in 2006 to map out the critical aspects of the business model for successful multi-family offices. The result is the FOX MFO Enterprise Series. The series will cover the five discrete operational areas:

1. Business Strategy
2. Business Development
3. Service Delivery
4. Talent and Team Structure
5. Process Management and Operations

The five titles currently available are:

1. *The Enduring Enterprise: Building a Sustainable Wealth Advisory Business*
2. *Pricing for Profitability: Pricing Practices in an Evolving Ultra-Wealth Marketplace*
3. *Standing Out in a Crowd: Strategies for Marketing, Positioning, and Leveraging Networks in Family Wealth Management*
4. *The Enterprise Sales Process: Best Practices in Business Development*
5. *Enhancing the Client Service Experience*

PLUS

Best Practices for Leading Wealth Advisors

Single family offices and wealth advisors alike come to FOX asking what they should be thinking about and the best way to discharge their responsibilities as managers of a family's future wealth and well being. With input from many of the industry's leading players, FOX has outlined the 75 key practices that have made a difference for successful wealth advisors and MFOs over time.

While not every practice applies to every business, this report provides a framework for identifying areas for improvement or will serve as an important tool for the board's continual assessment of the firm's performance relative to its business objectives.

The practices are grouped in the following five sections:

1. Business Strategy
2. Business Development
3. Scope of Services and Service Delivery
4. Talent and Team Structure
5. Process Management and Operations

The five Wealth Advisor Enterprise Series titles and ***Best Practices for Leading Wealth Advisors*** are available as part of an MFO Council membership. Non-members can purchase the package for US $12,400.

100 South Wacker Drive, Suite 800 ■ Chicago, IL 60606 USA ■ T: 1.312.327.1200 ■ F: 1.312.327.1212 ■ info@familyoffice.com
10 Rockefeller Plaza, 16th Floor ■ New York, NY 10020 USA ■ T: 1.646.504.0776 ■ F: 1.212.713.7621
Adam House 7-10 Adam Street ■ London WC2N 6AA United Kingdom ■ T: +44 (0) 207 170 4235 ■ F: +44 (0) 20 7170 4234

Family Office Exchange Publications and Research

Central to the FOX mission is the study of issues and concerns that members face in leading their families, managing their investments, and operating their offices. These are the most recent FOX research studies by topic.

Investing

2013 FOX Investment Survey

Selecting the Right Trusted Advisor

Investing Amid Uncertainty

Securing the Future: Managing Threats and Opportunities through Effective Risk Planning

Rethinking Investment Risk Management

Single Family Office Practices

50 Best Practices for an Enduring Family Enterprise

U.S. Family Office Primer: Purposeful Management of Family Wealth

Global Family Office Primer: Purposeful Management of Family Wealth

Building a Family Enterprise Plan to Deal With Future Uncertainty

FOX Insights: New Thinking in Family Wealth

FOX Briefing: 2012 Salary Increases and Bonuses

Recasting the Central Role of the Family Office as Risk Manager

The Cost of Complexity: Understanding Family Office Costs

Innovating to Survive and Thrive: Meeting the Challenge of Small Family Office Sustainability

How Wealth Owners Measure Value: Evaluating the Performance of Your Wealth Advisor or Family Office

Best Practices in Reporting Toolkit

Financial Reporting in the Family Office

Insurance Matters: The Case for Strategic Insurance Planning

Investing in the Future: A Look Inside the Small Family Office

FOX Technology Guide

Family Governance

Preparing the Next Generation for the Responsibilities of Ownership

Securing the Future: Managing Threats and Opportunities through Effective Risk Planning

The Challenges of Shared Ownership

Multi-Family Office Practices

The FOX Wealth Advisor Series

The Enduring Enterprise: Building a Sustainable Wealth Advisory Business

Pricing for Profitability: Pricing Practices in an Evolving Ultra-Wealth Marketplace

Standing Out in the Crowd: Strategies for Marketing and Leveraging Relationships

The Enterprise Sales Process: Best Practices in Business Development

Enhancing the Client Service Experience

Best Practices for Leading Wealth Advisors

Navigating the Wealth Management Landscape

Family Business

Taking Care of Business: Case Examples of Separating

Personal Wealth Management from the Family Business

Boundaries that Matter: Managing Family Assets Separately from the Family Business - SFO Solution

Protecting the Future: Managing Family Wealth Separately from the Family Business - MFO Solution

Wealth Owner Education

FOX Guide to Family Education

Preparing the Next Generation for the Responsibilities of Ownership

U.S. Family Office Primer: Purposeful Management of Family Wealth

Global Family Office Primer: Purposeful Management of Family Wealth

April 2013

100 South Wacker Drive, Suite 800 ■ Chicago, IL 60606 USA ■ T: 1.312.327.1200 ■ F: 1.312.327.1212 ■ info@familyoffice.com
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Adam House 7-10 Adam Street ■ London WC2N 6AA United Kingdom ■ T: +44 (0) 207 170 4235 ■ F: +44 (0) 20 7170 4234

Family Office Exchange

Expand Your FOX Network

Do you know someone who would benefit from FOX the way you do?

Anyone you recommend will get a 10% discount on their first year membership fees, and you will get a 10% reduction on your membership renewal* for each referral who joins.

FOX will not contact anyone you recommend without speaking with you first.

Your Name	Organization	Phone

Recommended Member Name	Title
Company Name	

Recommended Member Name	Title
Company Name	

Recommended Member Name	Title
Company Name	

***Some restrictions apply.**

Thank you!