2013 FOX Member Events - Global

As of July 15, 2013

Family Office Exchange®

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Forums*

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
			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*

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	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 **Family Business Owner Roundtable** Oct 2 Detroit **Family Business Owner Roundtable** Oct 8 Atlanta	**Grantors, Trustees and Beneficiaries** Nov 19-20 Dallas **Family Business Owner Roundtable** Nov 6 NYC	

Webinars*

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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	**You Control Your Own Destiny: Transitioning to Living off a Portfolio** Jun 26	**Is a Family Business Advisory Board Right For You?** Jul 10 **FOX Technology Survey Research Results** Jul 24	**Healthcare Reform Update: Are you ready for 2014?** Aug 7	**TBD** Sep 11 **Change is NOT an Option: Effective Family Office Leadership in Today's Age** Sep 25	**TBD** Oct 3 **Increasing the Probability of Successful Family Business Transitions** Oct 23	**TBD** Nov 6 **TBD** Nov 20	**TBD** Dec 4 **TBD** Dec 11

Councils

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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 Philadelphia **Sr. Management Council** Sep 17-18 Colorado Springs **Global Family Council** Sep 24-25	**Investment Council** Oct 1-2 NYC	**Owner/Operator Council** Nov 14-15 Pasadena	

*Eligible for CPE credit

Dates Subject to Change

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Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Roundtables											
		Family Office Roundtable Mar 20 London **Multi Family Office Roundtable** Mar 20 London					**Family Office Roundtable** Aug 7 Australia	**Family Office Roundtable** Sep 26 London			
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 **Regional Member Briefing** Jun 11 NYC **Regional Member Briefing** Jun 27 Chicago	**FOX/FDX Roundtable** Jul 24 San Francisco		**FOX/FDX Roundtable** Sep 10 Minneapolis **FOX/FDX Roundtable** Sep 17 Chicago **FOX All-Member Networking Event** Sep 19 Chicago	**Regional Member Briefing** Oct 2 Dallas	**FOX/FDX Roundtable** Nov 13 NYC **Regional Member Briefing** Nov 14 NYC	

**Eligible for CPE credit*

Dates Subject to Change

Family Office Exchange®

Save The Date

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 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

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FOX Educational Workshops

FOX Trustee Workshop

Preparing for Duty as a Family Trustee

November 19 – 20, 2013, Dallas, TX

Trustee is a position of honor and tremendous responsibility, yet many people assign or accept this role without full awareness of the scope of fiduciary responsibilities or the accompanying personal liability.

- For grantors, choosing a trustee means selecting an individual or organization that has the expertise and emotional skills to carry out his or her wishes.
- For beneficiaries, being part of a trust means knowing the rights, roles and responsibilities of both the beneficiary and the trustee and committing to a strong working relationship.
- For trustees, accepting this duty demonstrates a willingness to serve as a day-to-day administrator and long-term advisor to the beneficiary and future generations.

Whether you are selecting a trustee, becoming a trustee, or working with one as a beneficiary, it is critical to understand the full scope and duties of this position. Gain a deeper understanding of the core trustee duties, the skills, and the traits required to manage the personal demands of trusteeship.

FOX Family Business Owner Series: Preparing Families for Multi-Generational Success

How to Promote an Ownership Mindset

October 2, 2013, Detroit, MI

How to Promote an Ownership Mindset is the second of three installments in the Family Business Owner Series: Preparing Families for Multi-Generational Success offered by Family Office Exchange. This half day session, co-led by Family Office Exchange and Plante Moran, is directed toward business owning families that are looking to promote a responsible ownership mindset within the family enterprise. With a long-term view of thinking, about the resbonsibilities an owner and not just the benefits of being a shareholder, attendees also will focus on the risks inherent when operating a family office inside the operating business.

Building an Effective Board and the Role of Outsiders

October 8, 2013, Atlanta, GA

Building an Effective Board and the Role of Outsiders is the first of three installments in the Family Business Owner Series: Preparing Families for Multi-Generational Success offered by Family Office Exchange. This half day session, co-led by Family Office Exchange and Schiff Hardin LLP, is directed toward business owning families that are seeking to formalize their family business, family office, or family foundation board, with a view of including non-family board members. Attendees of this session will be able to develop their own process for building and evaluating an effective board.

How to Mitigate and Manage Financing Risks

November 6, 2013, New York, NY

How to Mitigate and Manage Financing Risks is the third of three installments in the Family Business Owner Series: Preparing Families for Multi-Generational Success offered by Family Office Exchange. This half day session, co-led by Family Office Exchange and TriState Capital Bank, is directed toward business owning families looking to understand the potential risks inherent within the family enterprise, and more specifically, to learn how risks relating to raising capital and obtaining financing for liquidity needs, both within and outside the operating business can be managed.

For additional information, please contact workshops@familyoffice.com.

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