








# 2014 FOX Member Events - Global



January	February	March	April	May	June	July	August	September	October	November	December
<b>Forums*</b>											
			<b>Wealth Advisor Forum</b> Apr 23-25 Chicago			<b>FOX Financial Executives Forum</b> Jul 22-23 Chicago			<b>FOX Fall Forum</b> Oct 28-30 Chicago		
<b>FOX Educational Programs and Workshops*</b>											
			<b>CHICAGO BOOTH Private Wealth Management</b> Apr 29-May 2 Chicago					<b>Private Family Trust Company Symposium</b> Sep 22-23 Chicago	<b>CHICAGO BOOTH Private Wealth Management</b> Oct 14-17 Chicago		
<b>Webinars*</b>											
<b>The Philanthropic Conversation: What Clients Expect from Their Advisors</b> Jan 22	<b>Strangers in Paradise: How Families Adapt to Wealth Across Generations</b> Feb 12	<b>Becoming ONE... Navigating Family Governance in a Blended Family</b> Mar 12	<b>CRM Solutions – Interoperability with Existing FO Systems</b> Apr 9	<b>Administering the Private Trust Company – Key Issues to Consider</b> May 7	<b>Tax and Estate Planning Issues of Multijurisdictional Cross-Border Families</b> Jun 11	<b>Behavioral Health Risks in Families of Wealth</b> Jul 9	<b>Organization and Operation of PFTCs: Building Effective Boards</b> Aug 20	<b>Health Challenges- The Aging Family Population</b> Sep 10	<b>Investments - Crowd Funding</b> Oct 1	<b>FOX 2014 Family Office Benchmarking Survey</b> Nov 12	<b>Topics of Concern to Global Members</b> Dec 3
<b>2014 Estate Planning Update</b> Jan 29	<b>Finding Investment Opportunities, The Year of the Alligator: Contrarian Opportunities for 2014</b> Feb 26	<b>Recruiting and Retaining Executive Talent</b> Mar 26	<b>Trends in the Private Equity Secondary Market</b> Apr 30	<b>Hot Topic: The Affordable Care Act</b> May 14	<b>Talent Management &amp; Acquisition: the Case for Effective Onboarding</b> Jun 25	<b>2014 FOX Investment Survey Report and Findings</b> Jul 16		<b>Talent Management - Leadership</b> Sep 17	<b>Risk Management - Understanding Captives</b> Oct 8	<b>Philanthropy - Topic TBD</b> Nov 19	<b>Human Resources- Compensation: Incentives and Equity</b> Dec 10
				<b>Mind the Gap: What are the Key Service Differentiators in the Family Wealth Management Industry?</b> May 21				<b>Governing the Next Generation from Abroad</b> Sep 24	<b>Preparing the Next Generation for Your Family Wealth Journey</b> Oct 15		
<b>Councils</b>											
<b>Financial Executive Council</b> Jan 30-31 Orlando	<b>Investment Council</b> Feb 10-11 NYC	<b>Sr. Management Council</b> Mar 6-7 Orlando	<b>Wealth Advisor Council - Europe</b> Apr 8 Paris	<b>Owner/Operator Council</b> May 6-7 Chicago	<b>Investment Council</b> Jun 11-12 Chicago	<b>Financial Executive Council</b> Jul 21-22 Chicago	<b>Wealth Advisor Council - Australia</b> Aug 12 Melbourne	<b>Global Family Council</b> Sep 30-Oct 1 London	<b>Wealth Advisor Council - Europe</b> Oct 3 London	<b>Sr. Management Council</b> Nov 5-6 San Francisco	
	<b>Family Business Council</b> Feb 25-26 Tampa	<b>U.S. MFO Council</b> Mar 12-13 NYC	<b>Global Family Council</b> Apr 10-11 Paris			<b>Thought Leaders Council Summit</b> Jul 21-22 Chicago	<b>Family Enterprise Council</b> Aug 13 Melbourne	<b>Wealth Advisor Council - U.S.</b> Sep 11 NYC	<b>Executive Council</b> Oct 7-8 Seattle		
	<b>Executive Council</b> Feb 27-28 Tampa							<b>Executive Council</b> Sep 8-9 San Francisco			

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<b>Regional Member Briefings and Roundtables</b>											
	<b>Family Enterprise Best Practice Roundtable</b> Feb 25 Sydney 	<b>Regional Member Briefing</b> Mar 20 Chicago	<b>Family Office Roundtable</b> TBD London 	<b>Regional Member Lunch</b> May 21 Boston	<b>Regional Member Briefing</b> Jun 16 NYC		<b>Melbourne Roundtable</b> Aug 20 Australia 	<b>Regional Member Lunch</b> Sep 18 Philadelphia		<b>Regional Member Briefing</b> Nov 20 NYC	
	<b>Family Enterprise Best Practice Roundtable</b> Feb 27 Melbourne 				<b>Regional Member Briefing</b> Jun 26 SFO			<b>Family Office Roundtable</b> Sep 29 London 			
<b>Wealth Advisor Briefings</b>											
	<b>Wealth Advisor Best Practice Roundtable</b> Feb 24 Sydney 	<b>Wealth Advisor Briefing</b> Mar 19 Chicago		<b>Wealth Advisor Briefing</b> May 21 Boston	<b>Wealth Advisor Briefing</b> Jun 17 NYC			<b>Wealth Advisor Briefing</b> Sep 18 Philadelphia		<b>Wealth Advisor Briefing</b> Nov 19 NYC	
	<b>Wealth Advisor Best Practice Roundtable</b> Feb 26 Melbourne 				<b>Wealth Advisor Briefing</b> Jun 25 SFO						
<b>All Member Networking Events</b>											
								<b>All Member Networking FOX 25th Anniversary Celebration</b> Sep 10 NYC			

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

## Enterprise Family Planning

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

### **Taking the Long-Term View of the Family Enterprise**

The Challenges of Shared Ownership

### **The State of the Art in Family Wealth Management**

## Family Business

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

### **Managing Family Capital Generated by the Family Business**

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

## Investing

### **2014 FOX Global Investment Survey**

Investing Amid Uncertainty

Navigating the Wealth Management Landscape

Rethinking Investment Risk Management

Selecting the Right Trusted Advisor

## Risk

Building a Family Enterprise Plan to Deal With Future Uncertainty

Insurance Matters: The Case for Strategic Insurance Planning

Recasting the Central Role of the Family Office as Risk Manager

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

## Small Family Office Sustainability

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

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

### **Bold title published in 2014**

List as of 06/13/2014

## Single Family Office Practices

50 Best Practices for an Enduring Family Enterprise

FOX Benchmarking 2013: Compensation and Benefits Survey

FOX Benchmarking 2013: Investment Survey

FOX Benchmarking 2013: Technology in the Family Office

FOX Guide to the Professional Family Office

FOX Insights: New Thinking in Family Wealth

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

The Cost of Complexity: Understanding Family Office Costs

## Technology and Reporting

Best Practices in Reporting Toolkit

Financial Reporting in the Family Office

FOX Technology Guide

## Wealth Owner Education

FOX Guide to Family Education

Global Family Office Primer: Purposeful Management of Family Wealth

Preparing the Next Generation for the Responsibilities of Ownership

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

## Multi-Family Office Practices

2012 Multi-Family Office and Wealth Advisor Benchmarking

Best Practices for Leading Wealth Advisors

*The FOX Wealth Advisor Series*

Enhancing the Client Service Experience

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

The Enduring Enterprise: Building a Sustainable Wealth Advisory Business

The Enterprise Sales Process: Best Practices in Business Development

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

Mark your calendar for the 25th Anniversary Celebration at the FOX Fall Forum, October 28-30 in Chicago. Here's a quick preview:

### Tuesday, October 28

- Opening luncheon at noon
- Afternoon workshops – concentrated learning opportunities
  - Dr. R. Kelly Crace will provide guidance on how to position your family for leadership
  - The 2014 Family Office Benchmarking Survey will convey insight into best practices
  - Data security and privacy issues will be addressed and solutions will be identified
  - Direct Investing Network members will discuss investment trends and direct deal experiences

**Social Event:** A private dinner for family members and office executives in the **Modern Wing of the Art Institute of Chicago.**

### Wednesday, October 29

- Sara Hamilton and other industry leaders will identify future opportunities and challenges for family enterprises
- A sixth generation governance and business succession story will feature the Bemberg family enterprise
- Pencils of Promise founder Adam Braun will share his story. He has built over 200 schools globally.
- Peer Dialogue opportunities will provide discussions unique to each peer community
- Eight breakout sessions will offer a variety of targeted learning experiences

**Social Event:** An evening of celebration at the renowned **Field Museum of Natural History**, with access to several key exhibits for the inquisitive mind.

### Thursday, October 30

- Noted demographer Neil Howe will lead attendees through generational patterns that influence future trends
- The FOX research team and several Thought Leaders will share insight into the impactful Client of the Future
- A panel will address the perceptions and realities of the conversation on issues of economic inequality
- Program adjourns at 2:00pm

### Palmer House Hilton, Chicago

FOX Fall Forum Headquarters will be at the recently renovated Palmer House Hilton Hotel, founded by the Potter Palmer Family in 1871.

**Please mark your calendar now. Registration materials will become available in late July.**

Keep up to date with this and other upcoming FOX events at: <https://www.familyoffice.com/learning-events>.