2015 FOX Forums

FOX Global Investment Forum™

September 10, The Harvard Club, New York, NY

The FOX Global Investment Forum™ aims to build a strong community among family members and family office executives who are responsible for the investments of their family. It will feature:

- World-class speakers such as Wilbur Ross, Oakleigh Thorne (CEO of Thorndale Farm, LLC and Co-President of Blumenstein / Thorne Information Partners, LLC) and Abigail Noble (Head of Impact Investing for the World Economic Forum USA)
- The annual in-person meetings of the FOX Direct Investment, Strategic CIO and Endowment Model Investing Networks
- Ample opportunity for networking and peer exchange with fellow top minds in the family office investing world

FOX Fall Forum™

October 21-23, 2015, JW Marriott, Chicago, IL

Our largest conference, the FOX Fall Forum™ is open to all FOX members and by invitation to select prospects who are not yet 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. The Forum covers a wide range of topics, including:

- Governance
- Investment
- A Seminar Day for families and family office executives only

FOX Global Owners Forum™

December 1-2, 2015, The Biltmore, Coral Gables, FL

Our newest Forum, the FOX Global Owners Forum™ is designed exclusively for family leaders. It will provide new insights on the specific challenges of enterprise owners, providing an occasion to think about long term issues, meet peers with whom they share common experiences, learn from families who are wrestling with transitions just like yours, and to hear from experts on key issues for the enterprise family.

Highlights from the FOX Global Owners Forum include:

- "Building Blocks for a Family Enterprise," a presentation by FOX Founder and CEO Sara Hamilton
- "Generational Views on the Family Enterprise," featuring four family groups speaking about their experiences in U.S., European and Latin American countries
- An investment panel on developing a global family wealth strategy

Family Office Exchange

FOX Trustees and Beneficiaries Workshop

November 17-18, 2015

Convene Conference Center
101 Park Avenue at 41st Street | New York, NY 10178

SAVE THE DATE

This day and a half workshop will provide attendees a deeper understanding of the core trustee duties and powers as well as the trustee's responsibilities for educating and mentoring the beneficiaries.

Come learn from experts in the field who will provide a balanced perspective of the legal, investing, and human behavioral aspects of being a trustee. The attendees will be comprised of your peers who are trustees or beneficiaries of family trusts.

Attendees of this workshop will learn to:

- Understand the duties and powers of a trustee
- Recognize the importance of building an effective relationship with the beneficiaries
- Differentiate between mandatory and discretionary distribution
- Manage the risks of serving as a trustee

Please save the date— November 17-18 at the Convene Convention Center in New York City.

Please email us at events@familyoffice.com if you would like to receive a reminder for when registration opens for this event.

If you have been or will be appointed a trustee you will want to attend this workshop. A trusteeship is a critical, active role that has significant influence on the welfare of the beneficiary and the sustainability of the assets, businesses, or properties that are in the trust. A properly prepared trustee means:

- A well educated and adjusted beneficiary
- Intelligently run investment and distribution strategies that fulfill the grantor's vision
- A harmonious and constructive relationship between the trustee and beneficiary

Family Office Exchange Publications and Research

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

Engaging the Client of the Future

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

2015 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

Single Family Office Practices

Engaging the Client of the Future

50 Best Practices for an Enduring Family Enterprise

FOX Benchmarking 2014: Family Office Benchmarking Report

FOX Benchmarking 2014: Family Office Compensation Report

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

Wealth Advisor Best Practices

Engaging the Client of the Future

2014 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

Bold title published in 2015
List as of 03/25/2015

100 South Wacker Drive, Suite 800 ■ Chicago, IL 60606 USA ■ T: 1.312.327.1200 ■ info@familyoffice.com
400 Park Avenue, Suite 810 ■ New York, NY 10022 USA ■ T: 1.646.504.0776
Adam House 7-10 Adam Street ■ London WC2N 6AA United Kingdom ■ T: +44 (0) 207 520 9443

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*** when they join.

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

Your Name	Organization	Phone

Recommended Contact Name	Title
Company Name	

Recommended Contact Name	Title
Company Name	

Recommended Contact Name	Title
Company Name	

Recommended Contact Name	Title
Company Name	

***Some restrictions apply.**

Thank you!

100 South Wacker Drive, Suite 800 ▪ Chicago, IL 60606 USA ▪ T: 1.312.327.1200 ▪ F: 1.312.327.1212
400 Park Avenue, Suite 810 ▪ New York, NY 10020 ▪ T: 1.646.504.0776
Adam House 7-10 Adam Street ▪ London WC2N 6AA United Kingdom ▪ T: 44 (0) 207 520 9443 ▪ F: 44 (0) 207 520 9441
info@familyoffice.com ▪ www.familyoffice.com