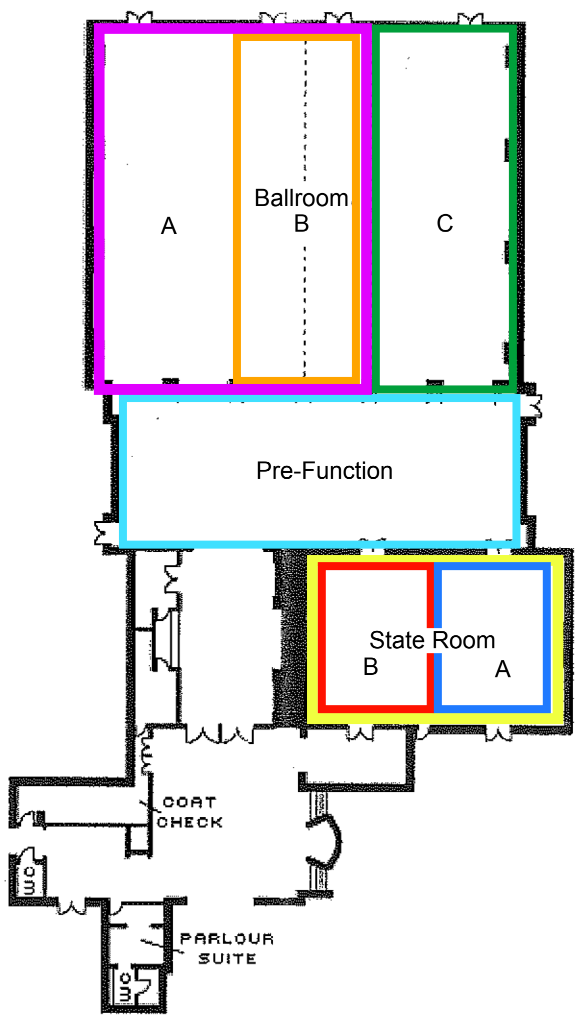
FOX Financial Executives Forum

In Pursuit of the Well-Run Family Office

Thursday, July 19

REGISTRATION / NETWORKING BREAKFAST	**7:30 a.m.**	**Ballroom C**
WELCOME Alexandre Monnier, FOX	**8:30 a.m.**	**Ballroom A&B**
TAX AND ESTATE PLANNING UPDATE Susan von Hermann, Schiff Hardin	**8:45 a.m.**	**Ballroom A&B**
LEGISLATIVE UPDATES FROM OUR NATION'S CAPITAL Jeff Cook, Policy and Taxation Group	**9:45 a.m.**	**Ballroom A&B**
NETWORKING BREAK	**10:30 a.m.**	**Ballroom Foyer**
GOOD-BYE TAX SHANGRI-LA? Mark Blumenthal, Blackman Kallick Plante Moran	**10:45 a.m.**	**Ballroom A&B**
BUSINESS CONTINUITY IN THE WORLD OF TECHNOLOGY Jeremy Kahn, Hartz Mountain Industries	**11:30 a.m.**	**Ballroom A&B**
LUNCH	**12:30 p.m.**	**Ballroom C**
FINANCIAL EXECUTIVE DIALOGUE	**1:30 p.m.**	
Business Continuity		**Ballroom B**
Human Resources		**State A**
Family Continuity		**State B**
BREAK	**2:45 p.m.**	**Ballroom Foyer**
GOING BEYOND THE TRADITIONAL QUARTERLY FINANCIAL REPORT Heather Asher, FOX Mike Madigan, Advent Software, Inc. W. Jackson Parham, Jr., Eton Advisors, L.P.	**3:00 p.m.**	**Ballroom A&B**
HUMAN RESOURCES CHALLENGES Karen Rush, FOX Bonnie Gauger, Johnson Keland Management, Inc. Shannon Zur, Vogel Consulting	**4:00 p.m.**	**Ballroom A&B**
CLOSING REMARKS	**5:00 p.m.**	**Ballroom A&B**
ADJOURNMENT	**5:15 p.m.**	**Ballroom A&B**

Four Seasons Hotel Chicago
8th Floor



■	7/18	State Room	Welcome Reception
■	7/19	Ballroom A&B	General Session
■	7/19	Ballroom B	Business Continuity Dialogue
■	7/19	State Room A	Human Resources Dialogue
■	7/19	State Room B	Family Continuity Dialogue
■	7/19	Ballroom C	Lunch
■	7/19	Pre-Function	Exhibitors

2012 FOX Member Events - Global

July 13, 2012

Family Office Exchange®

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Forums*												
				FOX Wealth Advisor Forum Apr 16-18 Miami	**FOX Investment Forum** May 3-4 New York City		**FOX Financial Executives Forum** Jul 18-19 Chicago			**FOX Fall Forum** Oct 22-24 Chicago		
FOX Educational Programs and Workshops*												
		Family Office 101 Feb 21-23 Miami	**Grantors, Trustees and Beneficiaries Workshop** Mar 27-28 Chicago						**Family Leadership Succession** Sep 10-12 New York City **Wealth Advisor Master Class** Sep 12-14 New York City	CHICAGO BOOTH **Private Wealth Management Course** Chicago Oct 30-Nov 2	**Grantors, Trustees and Beneficiaries Workshop** Nov 28-29 New York City	
Webinars*												
Investing												
		Special Tele-conference CFTC Feb 24			**Investment Consultants/ Outsourced CIO's** May 9						**Investment Topic** Nov 7	
Wealth Preservation												
		2012 Estate Planning Update Feb 8		**FOX Program on Governance** Apr 4	**PTCs and Directed Trusts** May 23		**Insurance Captives** Jul 11	**TBD** Aug 15	**Selecting a Wealth Advisor** Sep 5	**TBD** Oct 3		
Family Office Operations and Technology												
	Services in the Family Office Jan 11		**Family Office Compensation** Mar 28	**FOX Program on MFO Servicing** Apr 25		**FOX Program on Financial Reporting** Jun 13			**TBD** Sep 19		**TBD** Nov 21	**TBD** Dec 5
Family Legacy and Governance												
	Continuity Planning Jan 25					**Cultivating the Entrepreneurial Spirit and Skills** Jun 27				**TBD** Oct 17		**TBD** Dec 12
Councils												
	Investment Council Jan 16-17 New York City	**Sr. Management Council** Feb 23-24 Fort Lauderdale **Financial Executive Council** Feb 29-Mar 1 Atlanta	**Business Owner Council** Mar 5-6 San Diego **U.S. MFO Council** Mar 6-7 New York City **Executive Council** Mar 14-15 New York City **Global Family Council** Mar 20-21 Frankfurt		**Investment Council** May 14-15 New York City **Owner/Operator Council** May 16-17 New York City **Thought Leaders Council** May 22 New York City		**Financial Executive Council** Jul 18 Chicago	**Business Owner Council** Aug 20-21 Denver	**Sr. Management Council** Sep 12-13 Dayton **Executive Council** Sep 19-20 Chicago **Inaugural International MFO Council** Sep 20-21 London	**Investment Council** Oct 17-18 New York City **Global Family Council** Oct 2-3 London	**Owner/Operator Council** Nov 14-15 San Antonio	

**Eligible for CPE credit*

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Wealth Advisor Briefings*											
				FOX Wealth Advisor Briefing May 24 San Francisco	**FOX Wealth Advisor Briefing** Jun 21 New York City	**FOX Wealth Advisor Briefing** Jul 12 Chicago		**FOX Wealth Advisor Briefing** Sep 13 New York City **FOX Wealth Advisor Briefing** Sep 25 Philadelphia			
Regional Member Events*											
					Regional Member Event Jun 20 New York City			**Regional Member Event** Sep 12 New York City			

Eligible for CPE credit

FOX Educational Programs – 2012

FOX workshops provide a unique hands-on learning experience. Designed for in-depth exploration of relevant topics, participants will develop a plan of action as they problem solve with peers and the experts.

Family Leadership Succession: Developing a Roadmap for Successful Leadership Transition

September 10-12, New York, NY

The single greatest challenge for families of wealth is managing a successful family leadership transition. In this workshop you will hear how leadership succession is a process and not an event. Participants will learn how to use skills profiling to identify future leaders who have a greater chance of success and to engage owners in the succession conversation.

With guidance from experts in the field and input from your peers, you will develop a custom timeline and next steps for succession planning in your family business, family council, family office, and/or family foundation.

Recommended for: Family members and their trusted advisors.

FOX Wealth Advisor Master Class

September 12-14, New York, NY

FOX Wealth Advisor Master Class - the latest in an ongoing series of workshops designed specifically to meet educational needs expressed by FOX members and the wealth advisor community, examines what it takes to run a successful MFO as well as precisely what steps to take - knowledge essential in deciding whether and how to launch an MFO.

Recommended for: Individuals and firms who are looking to continue to increase the level of sophistication and adhere to best practices when managing their wealth advisory firms. This workshop is also recommended for new employees of established firms.

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

November 28-29, New York, NY

This workshop looks at the role of the trustee – their fiduciary expectations and requirements and the bounds of their authority – from multiple perspectives. Expert speakers will review best practices in trust administration and discuss strategies to help trustees and beneficiaries work together more effectively.

Recommended for: Wealth owners, single-family office executives and qualified multi-family offices.

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

June 29, 2012

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www.familyoffice.com ■ info@familyoffice.com

Family Office Exchange®

FOX Fall Forum

Chicago

October 22-24, 2012

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's leaders on current trends and meet in peer groups to discuss practical solutions to the challenges they face.

Visit www.familyoffice.com for more information.

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The FOX Council Membership

Family Office Exchange

The highest level of engagement, where the real work gets done.

FOX Councils are private networks of close peers working together to advance their professional development and to solve the unique challenges they face in their management of private wealth.

There are nine Councils, each a carefully composed group of compatible and complimentary professionals who do the same work and face the same challenges. The full list of Councils appears to the right.

"This [Council] is the sweet spot for FOX. This is where the value is beyond measure."

–Christine Franco, Duchossois Group

Your Experience

The Council experience brings you a highly customized interaction with your peers that is based on member-driven issues. Frequency and structures of the meetings vary from Council to Council but may include:

- Large and small group discussions facilitated by FOX senior staff on topics of critical interest
- On-site visits to peer offices that broaden participant's understanding of opportunities within their own offices
- Meeting industry leaders (Family Members) that share their perspectives about the family's past and future
- Best practice case studies such as training next generation leaders, technology solutions, and investment manager selection
- Presentations by expert speakers, as desired at the invitation of the group
- Insider perspectives on family philanthropic passions and the impact the family is bringing to their local and global communities

All council members receive the full benefits of FOX membership plus priority access to benchmarking and survey results and a dedicated senior relationship manager.

"Participating in the U.S. Executive Council has been a highlight of my 10 year+ FOX membership. I greatly look forward to the meetings and I heartily recommend membership in a FOX Council. It is the perfect way to get to know your closest peers and develop mutually beneficial relationships."

–Galen Oelkers, The Zeist Company, LLC

FOX Councils

- **FOX Executive Council™**
  Family Office CEOs overseeing U.S. multi generational family offices
- **FOX Senior Management Council™**
  Family Office COOs and experienced Executives overseeing U.S. multi generational family offices
- **FOX Investment Council™**
  Executives and Owners responsible for overseeing the family investment program
- **FOX Business Owner Council™**
  Family Office Executives managing a family office for a family that still owns the core business
- **FOX Financial Executive Council™**
  Family Office Financial Executives (CFOs, Controllers, Tax Managers) in a family office
- **FOX Owner/Operator Council™**
  Family members who oversee the operation of their family's office
- **FOX Global Family Council™**
  Family Office CEOs and Wealth Owners overseeing a multi generational, multi national family office
- **FOX Multi-Family Office Council™**
  Multi-Family Office Executives overseeing strategic business decisions and client service delivery
- **FOX Thought Leaders Council™**
  Multi-disciplinary panel of leading advisors exploring key challenges in wealth management

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Refer a Peer

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

Please note that FOX will not contact these individuals without speaking to you first.

Your Name	Organization	Phone

Peer Name	**Title**
Company Name	

Peer Name	**Title**
Company Name	

Peer Name	**Title**
Company Name	

Thank you!

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

Wealth Trends™: 2011 FOX Investment Survey Results

Selecting the Right Wealth Advisor

Investing Amid Uncertainty

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

Rethinking Investment Risk Management

Single Family Office Operations

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 Missing Piece: Uncovering the Cost of External Investment Services

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

Selecting the Right Wealth Advisor

Best Practices in Reporting Toolkit

Insurance Matters: The Case for Strategic Insurance Planning

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

FOX Technology Guide

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

Global Family Office Primer: Purposeful Management of Family Wealth

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 Operations

Enhancing the Client Service Experience

The Enterprise Sales Process: Best Practices in Business Development

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

Selecting the Right Wealth Advisor

Best Practice in Reporting Toolkit

Insurance Matters: The Case for Strategic Insurance Planning

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

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

The Enduring Enterprise: Building a Sustainable Wealth Advisory Business

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

Family Education Toolkit

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 2012

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