

Agenda

Wednesday, October 21, 2015

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| REGISTRATION | 9:00 A.M. | GRAND FOYER |
| FIRST TIME ATTENDEE ORIENTATION | 10:00 A.M. | GRAND A |
| WELCOME LUNCHEON | 11:30 A.M. | BURNHAM |

CONCURRENT WORKSHOPS

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| <u>WORKSHOP 1</u> DEVELOPING A FAMILY VISION FOR THE FUTURE | 1:30 P.M. | GRAND B/C |
| <i>Sara Hamilton, Founder and CEO, Family Office Exchange; Margaret Vaughan Robinson, President, MCV Consulting</i> | | |

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| <u>WORKSHOP 2</u> ENGAGING IN SOLUTION-BUILDING: THE IMPACT INVESTING GAME | 1:30 P.M. | GRAND A |
| <i>Abigail Noble, CEO, The ImPact; Michael Drexler, Head of Investors Industries of The World Economic Forum</i> | | |

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| <u>WORKSHOP 3</u> ASSESSING FAMILY WEALTH ROLES: LAY IT ON THE LINE EXERCISES | 1:30 P.M. | LINCOLN |
| <i>Danielle Oristian York, Director, 21/64; Annie Hernandez, Executive Director, Frieda C. Fox Family Foundation</i> | | |

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| <u>WORKSHOP 4</u> ADDRESSING BEHAVIORAL HEALTH ISSUES AND ADDICTIONS IN THE FAMILY | 1:30 P.M. | MADISON |
| <i>Arden O'Connor, Founder, Diana Clark J.D., MA, Director of Family Services, O'Connor Professional Group</i> | | |

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| RISING GENERATION OF LEADERS RECEPTION | 6:00 P.M. | LOBBY LOUNGE |
| <i>Please note: This Reception is for family members in their 20's-40's who are aspiring leaders within their families enterprise.</i> | | |

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| FAMILY MEMBERS, OFFICE EXECUTIVES AND THOUGHT LEADERS COUNCIL DINNER | 6:00 P.M. COCKTAILS | |
| | 7:00 P.M. DINNER | BURNHAM |

Thursday, October 22, 2015

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| REGISTRATION | 7:00 A.M. | GRAND FOYER |
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| BREAKFAST | 7:30 A.M. | BURNHAM |
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| WELCOME, PROGRAM OVERVIEW AND FOX TRENDS UPDATE | 8:30 A.M. | GRAND BALLROOM |
| <i>Alexandre Monnier, President, Family Office Exchange</i> | | |

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| DEFINING AND ALIGNING THE CLIENT EXPERIENCE | 9:15 A.M. | GRAND BALLROOM |
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Speaker: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange
Panelists: Marianne Herlihy, Family Office Advisor, Hemenway & Barnes, LLP; Robert M. McLane, Jr., Senior Director, BNY Mellon; Barbara Atkinson, BA, CHRP, Vice President, Human Resources & Client Services, Werklund Family Office; Eli Greiner-Quiett, Chief Client Service and Operations Officer, Fiduciary Counselling, Inc.

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| BREAK | 10:30 A.M. | |
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Agenda (continued)

Thursday, October 22, 2015

FAMILY PEER DIALOGUE SESSIONS

STRUCTURED PEER DIALOGUE FOR FAMILY MEMBERS AND FAMILY OFFICE EXECUTIVES

11:00 A.M.

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| Wealth Owners and Family Leaders | LINCOLN |
| Executives for Business-centric Offices | OGDEN |
| Executives of Small Offices (1-5 employees) | GRAND A |
| Executives of Medium Offices (6-15 employees) | MADISON |
| Executives of Large Offices (16+ employees) | CHICAGO |

ADVISOR BREAKOUT SESSION

ASSESSING HIGH IMPACT TRENDS IN THE FAMILY OFFICE INDUSTRY

11:00 A.M.

GRAND B/C

NETWORKING LUNCHEON

12:30 P.M.

BURNHAM

CONCURRENT FOX NETWORK LEARNING TRACKS: SESSION ONE



TRACK 1: EDUCATING OWNERS

FAMILY CULTURE AND EMBRACING CHANGE

2:00 P.M.

GRAND B/C

Sara Hamilton, Founder and CEO, Family Office Exchange; Matthew Wesley, J.D., M.Div., Founder, The Wesley Group



TRACK 2: THE RISING GENERATION

SOCIAL MEDIA...HOW DO YOU PROTECT YOURSELF AND YOUR FAMILY?

2:00 P.M.

GRAND A

Andy Campbell, Partner, Novack and Macey, LLP; Jeffrey Carroll, Assistant Vice President, AIG Private Client Group



TRACK 3: INVESTING DIRECTLY

INDUSTRY SECTOR DYNAMICS

2:00 P.M.

LINCOLN

Part 1: Dan Kipp, Founder, Managing Partner, City Capital Ventures; Allen Tibshrary, Managing Director, City Capital Ventures

Part 2: Rob Gerhard, CEO, Umbono Capital; Jonathan Spencer, Director, Capital Markets, Umbono Capital

Part 3: Max DeZara, Founder and Managing Partner, Akoya Capital; Charles Eggert, Managing Director, Specialty Chemicals Sector Leader, Akoya Capital



TRACK 4: ADVANCING THE FAMILY TRUST

LESSONS LEARNED COMMUNITY DISCUSSION

2:00 P.M.

CHICAGO

Kim Kusilek, CFO, HRK Group, Inc.; Bill Seale, President, Shoebox Private Trust Company, LLC



TRACK 5: MANAGING INFORMATION

CYBERCRIME: IT'S ALL ABOUT YOU AND STEPS TO COMBAT IT

2:00 P.M.

MADISON

Steven Ryder, CEO, True North Networks



TRACK 6: DEVELOPING PROFESSIONALS

IMPLEMENTING AN AGILE VERTICAL LEADERSHIP FRAMEWORK

2:00 P.M.

OGDEN

Greg McCann, Founder and Consultant, McCann & Associates

Agenda (continued)

Thursday, October 22, 2015

CONCURRENT FOX NETWORK LEARNING TRACKS: SESSION TWO

 **TRACK 1: EDUCATING OWNERS**
FAMILY EDUCATION IN ACTION 3:45 P.M. GRAND B/C
Speakers: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange; Teresa Bellock, Editor-in-Chief, Family Office Exchange; FOX members will contribute their insights on family education.

 **TRACK 2: THE RISING GENERATION**
THE SANDWICH GENERATION AND ELDERCARE ISSUES 3:45 P.M. GRAND A
Andrea Hasten, CPA, J.D., MBA, Senior Vice President, Northern Trust; Margalit Tocher, President, Home Healthcare Assistance

 **TRACK 3: INVESTING DIRECTLY**
DIRECT INVESTING: OPPORTUNITIES IN THE REAL ESTATE MARKET 3:45 P.M. LINCOLN
Panelists: Ken Franasiak, Chairman and CEO, Calamar Enterprises; Peter Knell, Managing Director, KCB Real Estate; Jordan E. Slone, Slone Family Office, Chairman, Harbor Group International

 **TRACK 4: ADVANCING THE FAMILY TRUST**
THE ART AND COMPLEXITY OF TRUST DISTRIBUTIONS 3:45 P.M. CHICAGO
Miles C. Padgett, J.D. & CIMA, Partner, Kozusko Harris Duncan; Matthew Tobin, Managing Director, South Dakota Trust Company, LLC

 **TRACK 5: MANAGING INFORMATION**
NAVIGATING THE INTEGRATION CHALLENGE 3:45 P.M. MADISON
Pamela Pecs Cytron, CEO, Pendo Systems, Inc.

 **TRACK 6: DEVELOPING PROFESSIONALS**
HIGHLIGHTS FROM THE 2015 FOX COMPENSATION AND BENEFITS SURVEY 3:45 P.M. OGDEN
Bruce K. Benesh, Partner-in-Charge, Grant Thornton; Jane Flanagan, Director of Family Research, Family Office Exchange

ALL MEMBER DINNER AT THE MUSEUM OF BROADCAST COMMUNICATIONS 7:00 P.M. 360 N. STATE CHICAGO, IL

Shuttles will available to the Museum of Broadcast Communications.

Boarding begins at 6:30 p.m. at the JW Marriott lobby level and will begin departure at 6:45 p.m.

Friday, October 23, 2015

BREAKFAST 8:00 A.M. BURNHAM

OPENING REMARKS – STRATEGIES TO ENHANCE OWNER ENGAGEMENT 9:00 A.M. GRAND BALLROOM
Sara Hamilton, Founder and CEO, Family Office Exchange

DEVELOPING AN ENTREPRENEURIAL SPIRIT IN THE FAMILY 9:20 A.M. GRAND BALLROOM
Ann Dugan, Managing Director, Family Advisory Services, Headwaters | SC; Sean Ammirati, Leading Partner, Birchmere Ventures

BREAK 10:30 A.M.

FINDING YOUR LIFE PURPOSE 11:00 A.M. GRAND BALLROOM
Jonah Wittkamper, Co-Founder and Global Director, Nexus Global Youth Summit

CLOSING LUNCHEON – IMPACT INVESTING, AN ACCELERATOR FOR ECONOMIC RETURN 12:00 P.M. BURNHAM
Moderator: Charly Kleissner, Ph.D., Co-Founder, Toniic
Family Members Panel: Ian Simmons, Co-Founder and Principal, Blue-Haven Initiative; Ekaterina and Gijs Voskamp, Founders, Ocean Capital Holdings

FORUM ADJOURNS 2:00 P.M.