FOX Family Advisor Training Program

The FOX Family Advisor Training Program will equip wealth advisors and family office professionals with the qualitative skills needed to meet the demands of increasingly complex client relationships. Through a unique inside-out-approach, you will work on self-discovery and develop self-mastery to improve how you effectively engage with others – both your clients and your team.

You will learn the qualitative skills to:

1. Meet the demands of your clients to become a facilitator, coach, and partner
2. Expand your influence with clients and family advisor teams

Overview

Advisors and family office professionals are increasingly expected to not only have the technical and financial skills, but also the qualitative skills to help families navigate the complexities that come with wealth – family dynamics, engagement, change, and transitions. A family is a system of members whose deep emotional connections can prevent them from objectively focusing on financial decisions, resulting in advisors needing to understand those dynamics to do their job.[1] Grubman, Jaffe and Keffeler rightly call for a new approach and mindset in professional services, moving from a fear-based model to one that is strengths-based, leverages intrinsic motivation, and feeds engagement and resilience.[2] The challenge of changing expectations is compounded with two demographic shifts the industry must contend with. First, the Great Wealth Transfer will result in a new generation of clients seeking performance, personalization, and "human advice," in which advisors ask questions first and advise second.[3] Second, a big wave of retirement in the advisor industry is creating a gap in finding mid-career talent, with one third of the wealth management workforce expected to retire in the next ten years.[4]

1. Family Wealth Advisors Need Skills In Family Dynamics (Forbes)
2. Wealth 3.0: From Fear to Engagement for Families and Advisors
3. The 8 Step Playbook for Winning Millennial Clients (Vise)
4. 10 Disruptive Trends in Wealth Management (Deloitte)

Family
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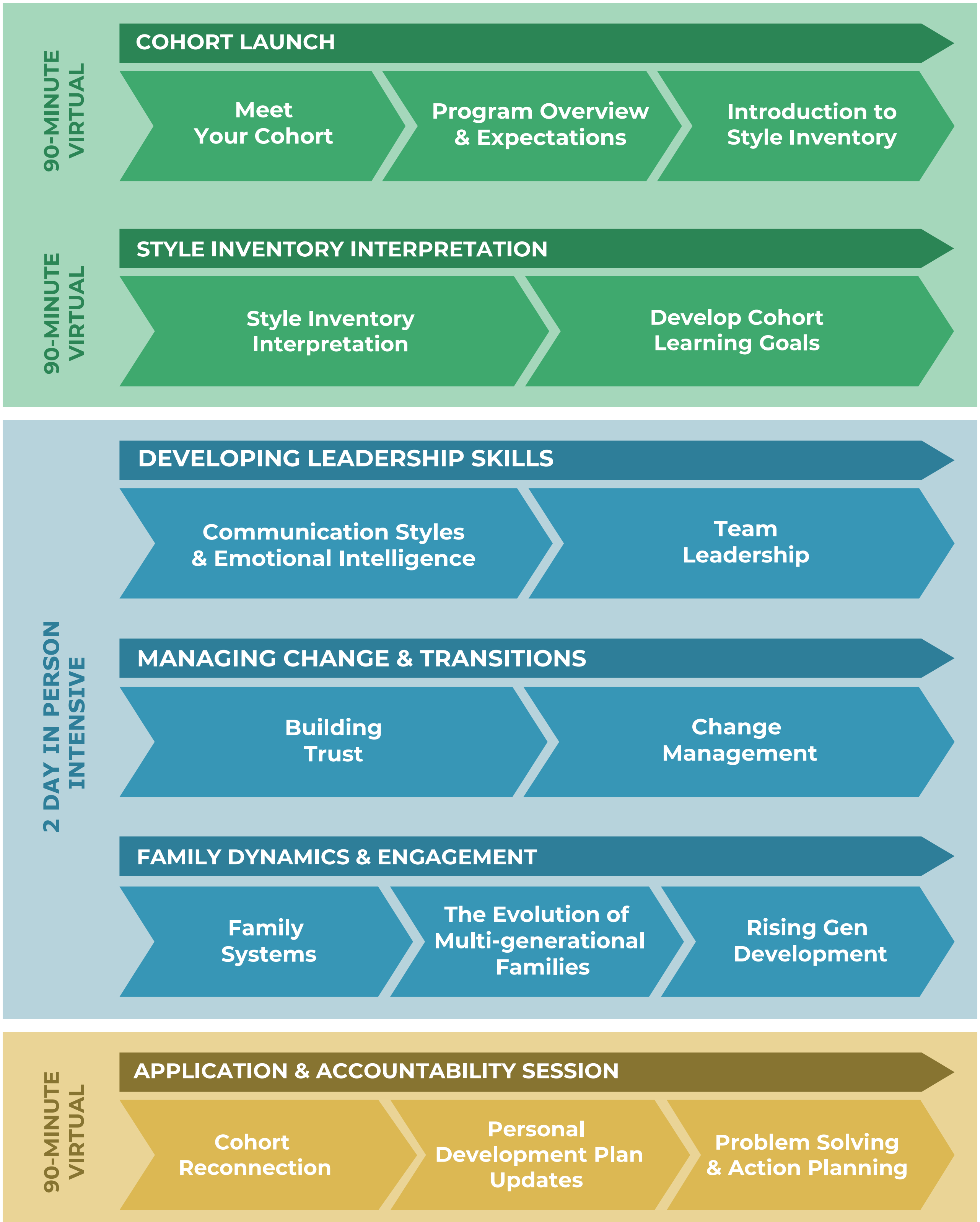
FOX FAMILY ADVISOR TRAINING PROGRAM

The FOX Family Advisor Training Program is designed to prepare you to face these challenges head on and develop you as an advisor and family office professional of the future.



Who Should Attend

Ideal for advisors and family office professionals seeking to balance technical skills with qualitative skills to handle increasingly complex relationships, the demands of preparing the rising generation for the future and navigating challenging family dynamics. Advisors with an appetite to develop their own self-mastery as an aspiring or current team leader will also benefit from this program.

What to Expect

- Learn to adapt your communication style to build trust and long-term relationships with clients and to lead your team.
- Understand emotional intelligence to effectively navigate professional relationships and the emotions of others.
- Cultivate fundamental coaching skills to effectively guide individuals and coordinate multi-disciplinary client and family office teams.
- Develop an understanding of the stages of organizational change and the impact it has on people.
- Develop a comprehensive understanding on how to develop and prepare the rising generation for ownership and leadership within the family enterprise.
- Connect qualitative skills with financial skills to move into a "coaching role" with the client.
- Understand the basics of family systems. Gain ability to effectively identify and navigate complex family relationships, including family decision-making systems and how they evolve over time.
- Build ability to foster trust-building behaviors among family members that improves decision-making.
- Curated resources and tools to manage your client relationships and advisory teams.

Program Design

A paced learning approach with a cohort of peer advisors and family office professionals that begins with two virtual prep sessions, followed by a two day in-person intensive learning program, and concluded with a virtual application and accountability session.

2024 Spring Program

90-Minute Virtual:
TBD

90-Minute Virtual:
TBD

2-Day In-Person Intensive:
May 15-16
Dallas, TX

90-Minute Virtual:
TBD

2024 Fall Program

90-Minute Virtual:
TBD

90-Minute Virtual:
TBD

2-Day In-Person Intensive:
September 18-19
Chicago, IL

90-Minute Virtual:
TBD

To inquire about the program contact **Allison Lawshe** at **alawshe@familyoffice.com**

Get CPE Credits

NATIONAL REGISTRY OF CPE SPONSORS

Family Office Exchange is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

Field of Study: Specialized Knowledge

Up to 10.5 CPE credits can be earned by attending this program. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures and acceptance may vary by state.

Program Faculty

Jeff Strese
Family Learning and Leadership Consultant

Jeff Strese is the Family Learning & Leadership Consultant for Family Office Exchange. In addition to his work at FOX, Jeff works with corporations, and mission-driven nonprofit organizations. He has more than 25 years of experience working across industries in the areas of leadership development, organizational effectiveness, and family dynamics. He holds certifications in family wealth and family business advising (CFWA, CFBA).

Jeff has served as Chief Talent and Learning Officer (CTLO) at Tolleson Wealth Management, a multi-family office serving client families across the country. Prior to his role at Tolleson, he served as the Chief Human Resources Officer (CHRO) at Southern Methodist University (SMU). He is currently an Adjunct Faculty member in SMU's COX School of Business Executive Education and Academic Director for an award-winning leadership development program.

Early in his career, Jeff was a Licensed Professional Counselor with a private counseling practice focusing on family systems and young adult development.

Mindy Kalinowski Earley, CMP, CFBA
Chief Learning Officer, FOX Learning Center

Mindy Kalinowski Earley is Chief Learning Officer for Family Office Exchange. In her role, she leads the FOX Learning Center, fosters integrated learning programs for enterprise families and is responsible for developing the family learning community. She co-chairs FOX's Rising Gen programming and serves as an outsourced Chief Learning Officer. In her consulting work, Mindy works closely with families and family offices to create learning programs, lead family meetings, facilitate multigenerational conversations, integrate the rising generation into family governance, and spearhead projects focused on family cohesion.

Over her career, Mindy has worked in two single family offices where she was responsible for creating and stewarding professional learning networks supporting human and intellectual capital. She designed learning experiences that increased the knowledge base and enhanced the life path of individuals while providing personalized support and coaching to help them meet their goals. She is a trained facilitator for the Strong Interest Inventory assessment, has a certificate in Family Business Advising and has a coaching certificate from the Association for Talent Development. Mindy enjoys helping families and rising generation members navigate the unique world of family enterprise and family relationships by understanding that responsibility and intention pave a path to personal achievement and satisfaction. She has a MA in Education with a focus on learning development and educational theory from Grand Valley State University. She has been featured in the New York Times, Family Business Magazine, and Successful Generations podcast and is a regular speaker and facilitator. Mindy lives in Grand Rapids, MI.

Program Faculty

Sara Hamilton
Founder and Family Advisor

Sara is one of the first professionals to recognize family offices as the most sophisticated segment of wealth management, and she has been described as "the Warren Buffet of the family office industry". When hundreds of U.S. families became centi-millionaires through leveraged buyouts in the 1980s and 1990s, private family offices were created to manage family capital and to educate wealth owners.

Sara founded the Family Office Exchange (FOX) as a peer network for family office executives in 1989. Within 10 years, she could see that families needed help with family governance and managing financial transitions, in addition to their family offices. As a result, FOX evolved into an advisor to family enterprises, a platform for sharing family wealth best practices, and an industry advocate for the importance of private enterprise in a global economy.

Today, Sara provides input to the strategic direction for FOX and supports the development of new programs and services for family enterprises and wealth advisory firms in 25 countries. Sara is the co-author of Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times. She serves on the executive education faculty of the University of Chicago Booth School of Business where she is an adjunct faculty member for their Private Wealth Management and Essentials of Wealth courses in the Executive Education program. She is on the founding board for the Foundation Advancing Impact and Sustainability in Bologna and the founding board for the Private Directors Association in Chicago.

Allison Lawshe
Learning Center Program Manager

Allison Lawshe is the Learning Center Program Manager at Family Office Exchange (FOX). In her role, she supports the design and delivery of learning programs, customized consulting projects, content creation and thought leadership for families, family office staff and advisors. She serves as the project manager for FOX Learning Center initiatives, as a key contributor to the Rising Gen Leadership Program and Family Advisor Training Program, and champions family learning and rising generation engagement. Allison is a purpose-driven professional dedicated to empowering individuals and families to step into their greatness and amplify their impact – for themselves, their families, their communities, and the world.

Allison brings ten years of family foundation experience to her work at FOX, most recently serving on the leadership team as Chief Program Officer at the IDP Foundation, Inc. She led the international education portfolio, which included strategic planning, cultivating and managing collaborative partnerships, global advocacy efforts, and scaling of a training and financing program to over 600 schools across Ghana.

Allison has an MPP from the University of Chicago, a BA in Economics and Latin American, Caribbean & Iberian Studies from the University of Wisconsin – Madison. She is a Certified Professional Coach and Everything DiSC Workplace® Facilitator. She also volunteers as an Executive Coach with the Executive Service Corps to propel the development of nonprofit leaders.

Program Sponsor

David Toth
Managing Director

David Toth is an Interim Co-President of Membership Family Office Exchange (FOX) and is market leader for FOX's Wealth Advisor members. In his role, he serves as Co-Chair for Multi-Family Office and Integrated Wealth Advisor Councils. He also Co-Chairs the Strategic Chief Investment Officer Council, a peer group for family office CIOs.

David serves as relationship manager for select wealth advisors and families providing strategic guidance, access to essential research and offers key insights on issues of importance to them. He has authored, presented, and consulted on topics ranging from client experience and pricing strategies to talent management.

He is as a member of the FOX leadership team, helping to develop and execute strategies designed to better meet member's evolving needs. David also participates in the development of new research and thought leadership for FOX members. David brings over thirty years of wealth and investment management, marketing, and strategic consulting experience to FOX and its members. He held key leadership positions in the Asset Management Division at PNC Financial formulating and implementing growth strategies that helped to more than double the size of their wealth and ultra-high net worth businesses.

David earned a BBA majoring in Marketing and an MBA majoring in Finance & Economics from University of Michigan and the University of Detroit/Mercy, respectively. In addition, David has completed Leadership and Executive Development programs at the University of Pennsylvania's Wharton School.

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