

**FOX
Family Office &
Wealth Advisor
Forum**

July 15-17, 2024
Chicago, IL
and Virtual

This forum brings together the UHNW industry to discuss the most critical challenges and opportunities impacting professionals in family offices and wealth advisory firms, and families they serve.

From operational themes such as wealth transfer planning, insourcing vs. outsourcing operations, macro investing, and artificial intelligence, to navigating human capital, cultivating family leaders, and investing in time capital, attendees will walk away with tangible ideas and key takeaways for enhancing their work. For our breakout sessions, two tracks will be created: one which focuses on family office executive related content, and one focused on advisor member firms programming.



WHO SHOULD ATTEND

Registration for this event is for family office and advisor members of FOX. Family members interested in the operational elements of the family office are welcomed.

Qualified non-member prospects may attend this event. For questions regarding eligibility please reach out to events@familyoffice.com.

Emerging Leaders Program Schedule

All times listed are in U.S. Central Time

Sunday, July 14 | 7:00 pm (welcome dinner)

Monday, July 15 | 8:30 am – 12:00 pm

In-Person Forum Schedule

All times listed are in U.S. Central Time

Monday, July 15 | 12:00 pm – 5:00 pm

Followed by the Sponsor Reception 5:00pm – 6:30 pm

Tuesday, July 16 | 8:00 am – 5:00 pm

Followed by the Reception and Specialized Advisor

Showcase 5:15 pm – 7:00 pm

Wednesday, July 17 | 8:00 am – 12:00 pm

Virtual Forum Schedule

All times listed are in U.S. Central Time

Monday, July 15 | 1:30 pm – 5:00 pm

Tuesday, July 16 | 9:00 am – 3:30 pm

Wednesday, July 17 | 9:00 am – 12:00 pm

KEYNOTE SESSION

Unlocking the Value of Time Capital



John Coyle

Design Thinking Expert, Olympic Medalist, and Emmy Award Winner

Since the pandemic, FOX has taken a closer look at the various types of capital available to families and the offices that serve their needs. One such category of capital not yet discussed at our Forums is TIME CAPITAL. We can all agree on the limited nature of time and the importance of allocating, investing, spending and cherishing the time we have.

Time, as we experience it, is not linear, yet why do we pretend that it is? Time speeds up, slows down, and it stops. The ancient Greeks recognized the difference in experiential time, called *kairos*, and chronological time, or *chronos*. When you value your time based on the memories created by your experiences, the value of an increment of time is not related to its duration. John will explain the mechanics of how the brain “constructs” time out of memories, and will use his Design Thinking expertise to show you how to create experiences – for yourself, family and loved ones - to maximize memory creation and recall.

To register and learn more

To see the full agenda and register, visit us online at familyoffice.com/FOWAF24 or contact your relationship manager. For questions, please contact us at events@familyoffice.com.

	FOX MEMBERS	NON-MEMBERS
Individual Attendees	US\$3,650	US\$4,550
Multiple Attendees from the same organization	US\$3,300	US\$4,100
Virtual Attendee	US\$495	US\$895

CPE Credit

Up to 8.5 CPE credits can be earned by attending this event. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures, and acceptance may vary by state. Please visit the forum website for additional information.

FEATURED SESSIONS

The Human Factor of AI: Preparing Your Organization for Positive Disruption

How can emerging AI programs and workplace tools create opportunities for progress and growth without creating a culture of fear and avoidance within your organization? In this session, you will hear an introductory, moderated interview with industry expert Alex Wissner-Gross to set the stage for the impact of AI in family enterprise. This will lay the groundwork for an interactive leadership development session facilitated by FOX's Kent Lawson and Jeff Strese. From their collective experience, they will share key principles of change leadership and human capital strategies that prepare the family office, and wealth advisory organizations for positive disruption.

The 5 Principles of Invisible Wealth: a framework for redefining wealth

The 5 Principles of Invisible Wealth provide a comprehensive framework for redefining wealth. As we all know, wealth is more than money, but how do we best take this abstraction and bring it into action? This framework, represented by the five principles of money, health, knowledge, time and relationships, helps us to practically embrace a holistic interpretation of wealth, inviting richness into the lives of our clients and families.

Emerging Leaders Program

We are pleased to introduce the Emerging Leaders Program at the Family Office and Wealth Advisor Forum, exclusively for FOX members.

This program will be hosted by Jeff Strese, Family Learning and Leadership Consultant, and include peer dialogue, qualitative skills development for advisors and FO leaders and opportunities for networking and discussions between peers, followed by the forum.

Family Office and Advisor FOX Members that register for the in-person program may bring one additional complimentary attendee from their firm or family office that fits the following criteria:

- Less than five years in the family office/private wealth management space.
- Less than five years at your office.

To participate in this program, both the sponsoring registrant and emerging leader must be registered by June 20.

VENUE AND ACCOMMODATIONS

Swissotel Chicago
323 East Upper Wacker Drive
Chicago, IL 60601

FOX has reserved a limited number of rooms at the Swissotel at a rate of \$275 per night plus applicable taxes. To obtain this discounted rate, please contact the Swissotel directly at 1.888.737.9477 and mention the Family Office Exchange. You may also book rooms online by clicking [here](#).

Forum attendees are responsible for making their own accommodation arrangements. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is June 20, 2024.

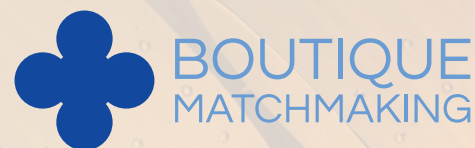


FORUM PARTNERS AND SPONSORS

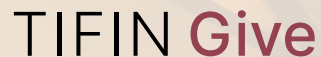
Executive Partner



Classic Partner



Resource Partners



Sponsor



Media Partner

