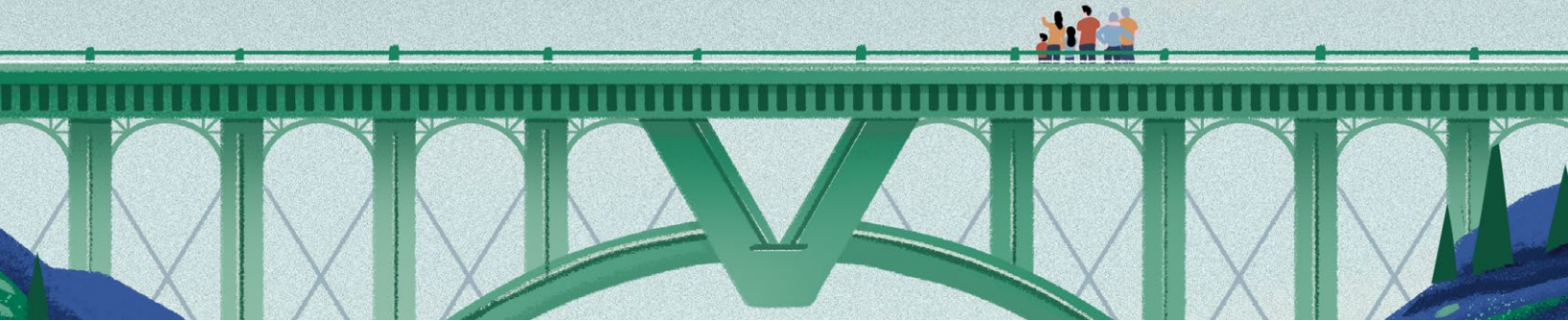


# BUILD AN ENTERPRISE FAMILY TO LAST WORKSHOP

## 48 STRATEGIES TO DEVELOP A SUSTAINABLE ENTERPRISE



This workshop offers a roadmap for owners wanting to build an enduring enterprise that is greater than a single business. It's important to develop an enterprise mindset when the family faces the complexity that comes with owning multiple businesses, properties, investments, and/or philanthropies.

Our comprehensive guidebook offers a structured approach to creating and sustaining an enterprise that thrives across multiple generations. This workshop is for leaders who want to integrate family goals across all enterprise domains using a clear, cohesive planning process. Bring up to four members of your strategic planning team (family leaders, board members, or senior managers) to learn how to develop your roadmap for a lasting enterprise family.

On day 1, attendees will explore 15 milestones in the **Family Journey**, generating a shared understanding of the benefits of aligning family interests and goals. Day 2 introduces 18 milestones in the **Enterprise Journey**, which lead to a shared vision for the future enterprise and the actions needed to implement that vision. Day 3 introduces 15 milestones in the **Personal Journey** for next generation family members searching for their role in the family and the enterprise.

Peer groups walk through all three stages of the process together: where you are today, where you want to go, and how you want to get there.

**FEBRUARY 5-7, 2025**

Miami, FL

### DAY 1: FAMILY JOURNEY

Explore 15 milestones and generate a shared understanding of the benefits of aligning family interests and goals.

### DAY 2: ENTERPRISE JOURNEY

Introduces 18 milestones that lead to a shared vision for the future enterprise and the actions needed to implement.

### DAY 3: PERSONAL JOURNEY

For next generation family members searching for their role in the family and the enterprise.

"The goal is for every family member to be 'fully capitalized.' This workshop makes me focus on how concepts can be implemented and institutionalized so they are not one-time discussions"

- Family Member and Family Office CEO

"We are leaving with more tools for integrating the next gen and spouses into the family office. We are leaving with new options and tactics that make me hopeful."

- Family Member and Board Member

"This book is phenomenal. It provides common language and a collaborative tool for the family. I'm going to give copies of it to my whole leadership team."

- Family Office CEO

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Family  
Office  
Exchange

**ENTERPRISE FAMILY  
ADVISORS**

### THE FAMILY JOURNEY

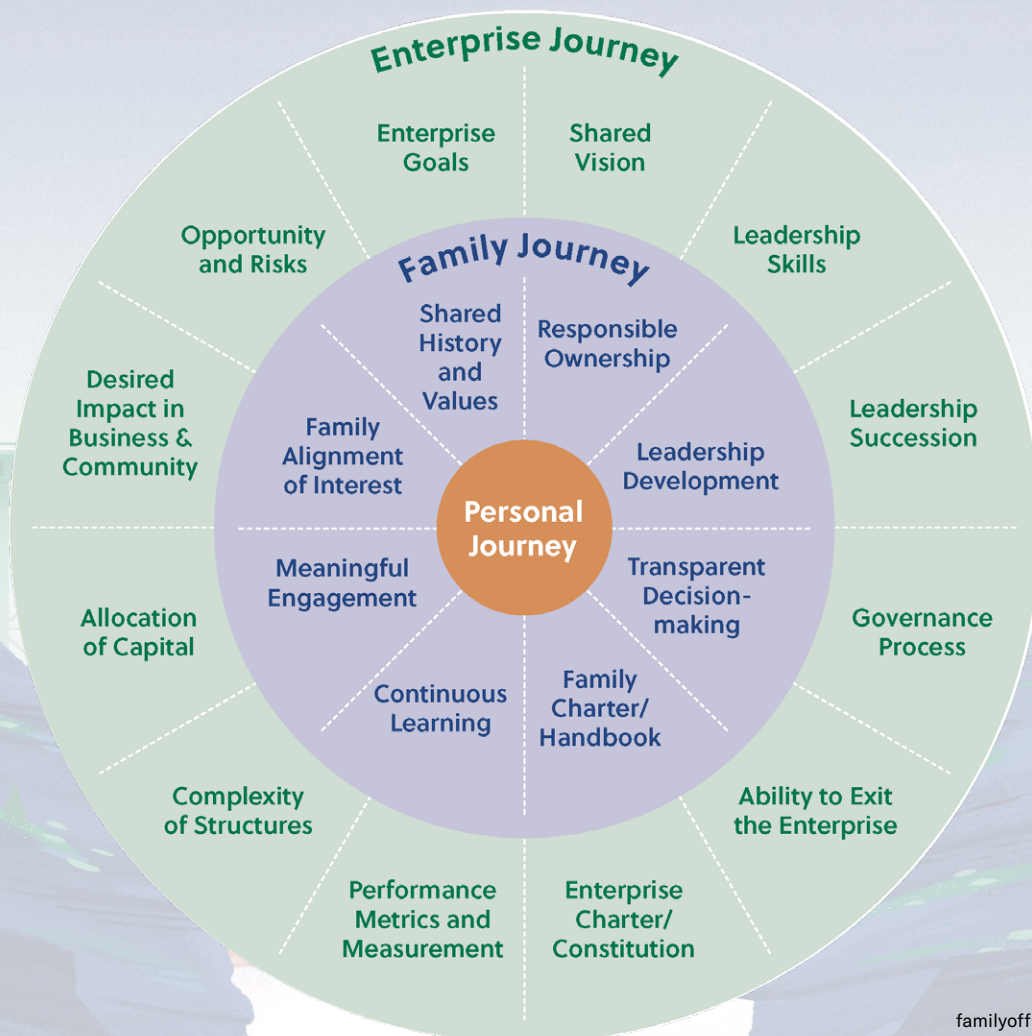
- How do values and guiding principles impact the family's future together?
- What are sound policies for inclusion and responsible ownership?
- How can you develop owners' skillset for managing or reducing enterprise complexity?
- How can you design a learning culture that fosters participation among owners?
- How do you design an equitable, objective process for leadership development and selection?

### THE ENTERPRISE JOURNEY

- What are the benefits of building a multi-generational enterprise?
- What opportunities and risks will challenge your enterprise in the future?
- How does the family develop a shared vision and goals for the future of the enterprise?
- What leadership skills will be needed to support the vision and goals?
- How do you design a governance system that supports a complex enterprise?
- What metrics should be used to monitor and measure the enterprise's performance and satisfaction of its owners and stakeholders?

### THE PERSONAL JOURNEY

- How knowledgeable are you and others within your generation on the operations of your family's enterprise? What's been your involvement to date?
- What unique character traits and skills do you have, or are developing, you feel would allow you to best contribute to the family enterprise?
- What areas are of the most interest to you? What opportunities can you identify to build knowledge and experience?





WHO SHOULD ATTEND

Ideal for family members, leaders, family office executives, and board members who are seeking to develop strategies for the many dimensions of the enterprise and sustain it.

WORKSHOP AGENDA OVERVIEW All times listed are in U.S. Eastern Time

WED, FEB 5

9:00 AM  
Workshop begins

9:30 AM  
THE FAMILY JOURNEY

Where we’ve been and where we are today

- Map family history
- Assess current culture and behaviors
- Identify core values and responsible ownership

Where we want to go

- Align family interests
- Assess readiness for change
- Build a learning culture

How we plan to get there

- Identify trusted decision making process
- Design leadership selection policies
- Offer opportunities for participation/engagement

5:00 PM  
Day 1 Concludes

6:30 PM  
Peer group reception and dinner

“It’s clear to me that there is so much risk for families who don’t invest in the Family Journey and so much to be gained by investment in it.”

- Family Enterprise Board Director

THU, FEB 6

9:00 AM  
Reflections and insights

9:30 AM  
THE ENTERPRISE JOURNEY

Where we’ve been and where we are today

- Review benefits of current enterprise
- Assess identity and impact
- Investigate opportunities and risks

Where we want to go

- Develop future scenarios
- Articulate a shared vision
- Identify leadership skills and a succession process

How we plan to get there

- Design efficient governance framework
- Develop process to assess and mitigate risks
- Develop a written enterprise charter to document goals and agreements

5:00 PM  
Day 2 Concludes

“We have new clear metrics to measure the intangibles (such as belonging, fulfillment, and return on human capital).”

- Family Member and Family Office Board Co-chair

FRI, FEB 7

9:00 AM  
Reflections and insights

9:30 AM  
THE PERSONAL JOURNEY

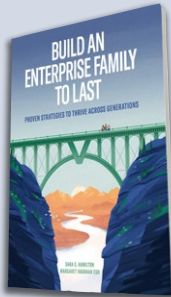
- Map personal journey to identify personal goals
- Inventory personal skills and interests
- Consider skills needed for future enterprise leaders
- Identify desired personal role(s) and engagement levels
- Create opportunities to demonstrate leadership skills

12:30 PM  
Workshop adjourns

WORKSHOP PRICING

	FOX MEMBERS	NON MEMBERS
Individual	\$5,300 USD	\$6,350 USD
Multiple attendees from the same family or firm	\$4,800 USD	\$5,800 USD

All workshop attendees will receive a copy of “Build an Enterprise Family To Last.”







**SARA HAMILTON**

**Founder and Board Chair, Family Office Exchange  
Co-founder, Enterprise Family Advisors**

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.



**MARGARET VAUGHAN COX**

**Founder and President, MCV Consulting  
Co-founder, Enterprise Family Advisors**

Margaret Vaughan Cox is president of MCV Consulting, a consultancy dedicated to helping families and their enterprises thrive across generations. She is sought out by sophisticated and high-profile wealth owners to help them thoughtfully plan for and navigate complex generational transitions. Margaret works with families to establish shared vision and goals for their enterprise, create and evolve effective governance and decision-making structures, develop and implement succession plans, and nurture the valuable capital that enriches the family beyond their financial assets. She builds enduring relationships with her clients, often serving as a trusted advisor to multiple generations within the same family over the course of many years.

Margaret is routinely referred to families and family office executives by wealth advisors, estate planning attorneys, and other key advisors who recognize there are important conversations and alignments the family must achieve before efforts on other fronts will be successful. With over 25 years of experience in her field, Margaret’s work has taken her throughout North America, Latin America, Europe, Australia, South Africa, and the Middle East.

An avid civic volunteer, Margaret currently serves on the Houston Ballet board of trustees, the Houston Advanced Research Center for Sustainability Science board of directors, the Menil Collection Council, and the advisory council of Yes Prep Public Schools. She is a member of the Collaboration for Family Flourishing, the International Women’s Forum, and is director emeritus of The Texas Lyceum, a select group of 96 leaders from across the state of Texas.