

October 7, 2024

# Member Town Hall

Q3'24 FOX Member Town Hall



Family  
Office  
Exchange

# Today's Agenda

- Welcome
- Family Forum Preview
- Highlights from Building an Enduring Enterprise Family Workshop
- E-Learning Opportunities
- First In Person Technology Showcase
- Q4 into 2025 Events
- Open Dialogue

# Family Forum

Oct. 28-30, 2024  
Atlanta, GA

Register at:  
[familyoffice.com/FF24](https://familyoffice.com/FF24)



FEATURED SESSION

# What is Your Superpower? Empowering Individuals and Family Members to Achieve Their Purpose



**John K. Coyle**

Design Thinking Expert, Olympic Medalist,  
and Emmy Award Winner



FEATURED SESSION

# Navigating the Artificial Intelligence Frontier



**Dave Blundin**

Founder, Exponential Ventures





FEATURED PANEL

# Women in Wealth: Shaping the Future of the Industry



**Katherine Dunlevie**

Family Office Executive



**Amy Hart Clyne**

Chief Knowledge & Learning Officer, Pitcairn



**Lindsay Jackson**

Senior Director of Family Services, AMB Group, LLC



**Kim Kamin**

Partner, Chief Wealth Strategist, Gresham Partners, LLC



**Michelle Langdon**

Co-founder, Wellth Works



FEATURED PANEL

# The 10x10 Learning Roadmap: A Framework to Help Families Flourish



**Stacy Allred**

Managing Director, Head of Family Engagement  
and Governance, J.P. Morgan Wealth Management



**Joan DiFuria**

Co-Directors, Money, Meaning, & Choices Institute



**Stephen Goldbart**

Co-Directors, Money, Meaning, & Choices Institute



FEATURED SESSION

# The Enterprise Family Journey: Proven Strategies to Align Family Goals Across Generations



**Sara Hamilton**

Founder, FOX and Family Enterprise Advisors

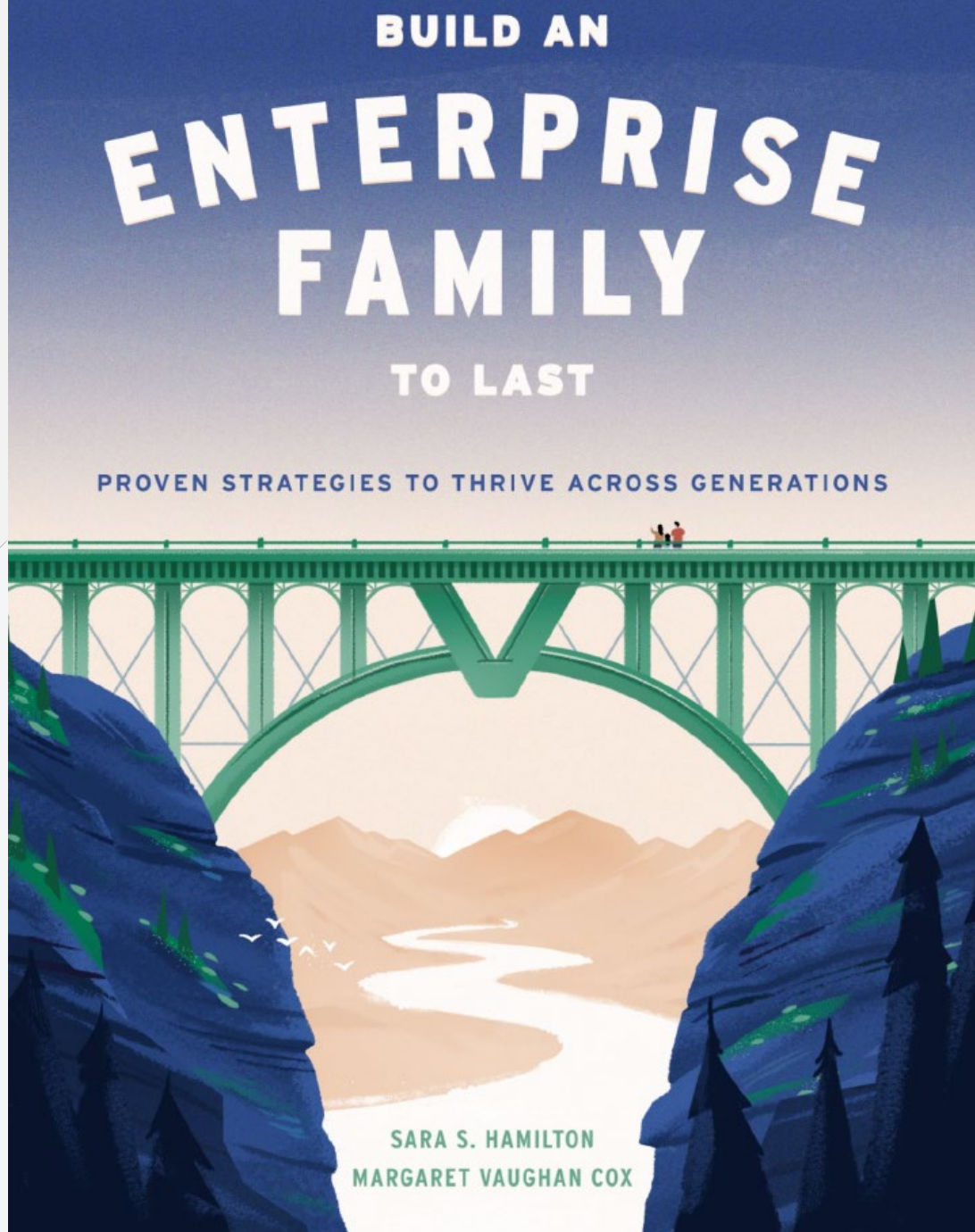


**Margaret Vaughan Cox**

Founder, MCV Consulting and Family  
Enterprise Advisors







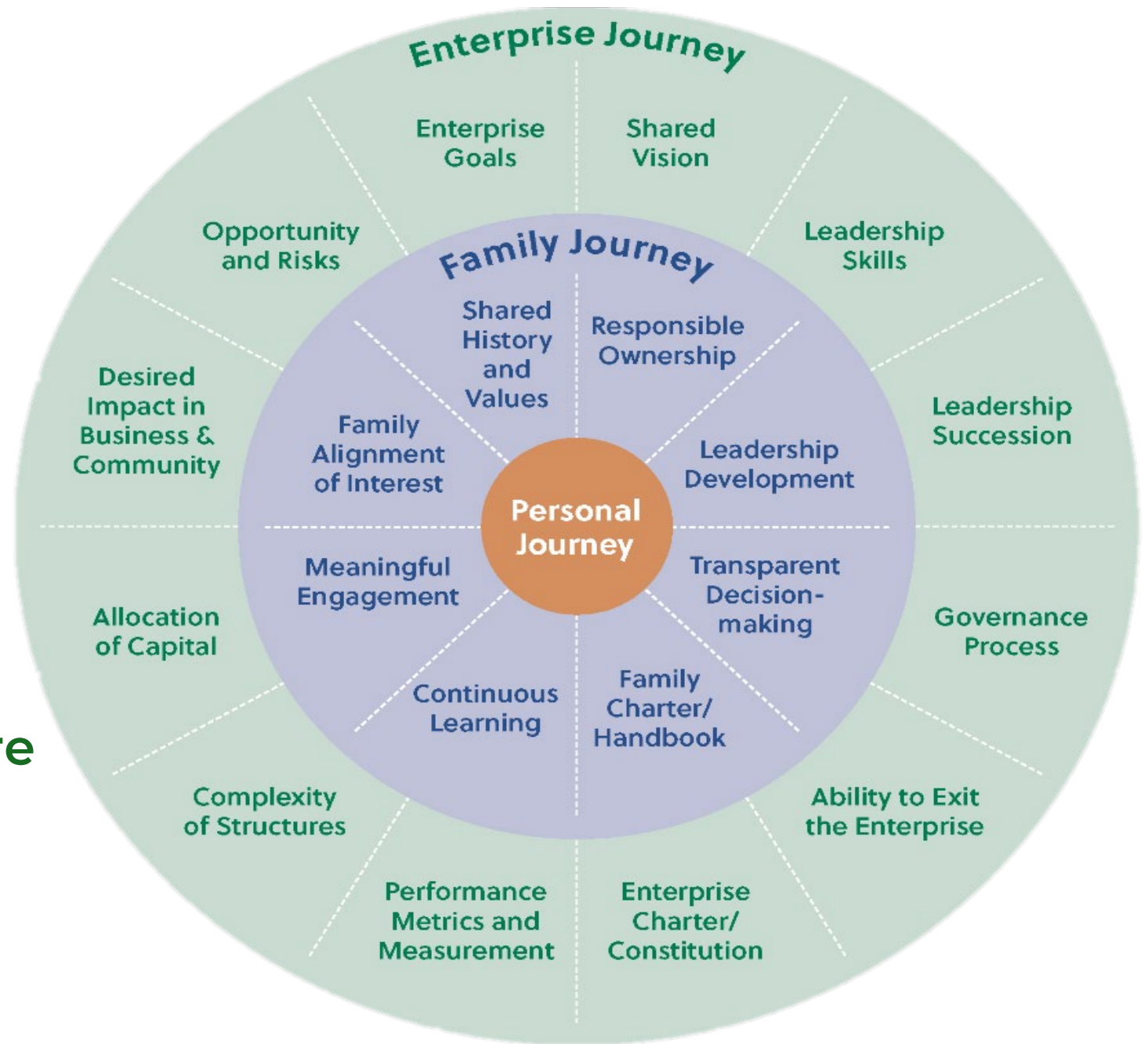
“Preserving the family  
in the midst of wealth  
is far more difficult  
than preserving the wealth.”

## 3 Stages in the Plan:

Where We Are Now

Where We Want To Go

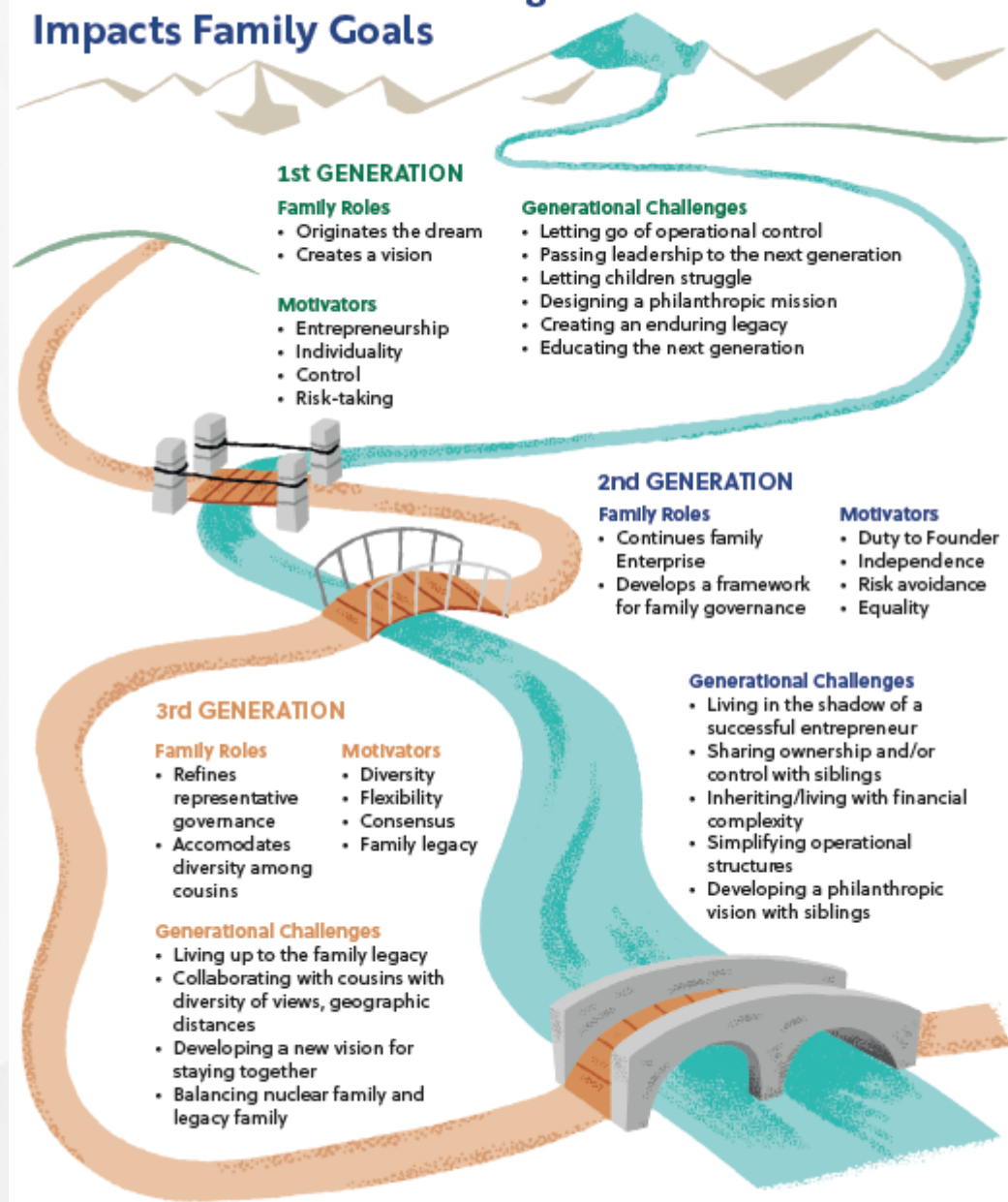
How We Plan To Get There





## MILESTONE 8

### Current Generational Bridge Impacts Family Goals



An essential part of assessing where the family wants to go is to understand where they are in the evolution of generations. In the diagram, you will see there are patterns common to each generation which are remarkably universal. While strategies for dealing with generational challenges will vary by culture and family history, it is very helpful to understand these patterns and discuss how they inform the family's experiences. Different sets of goals and challenges await a family as it crosses each generational bridge.

For instance, as the family crosses the first bridge from Founder to Siblings, the founder must learn how to share control, and siblings must develop a model for assuming control and reaching consensus despite their differences. As the journey continues across the bridge from Siblings Consensus to Cousins Consortium, siblings will need to shift from a branch-centric orientation to an allegiance to the whole, and cousins will need to find effective ways to collaborate with increased numbers and diversity.

When the family reaches the bridge from Cousins Consortium to Cousins Federation, the large extended family will need to find ways to remain unified around shared interests. At each generational stage, the family will engage in a thoughtful process to answer the questions addressed earlier, "Do we want to stay together and why?" and identify shared goals that will guide them into the next generation.

Knowing what the family values most about the Enterprise and which generational bridge they are standing on will help the group define the collective goals they hope to accomplish together.

### Case Study

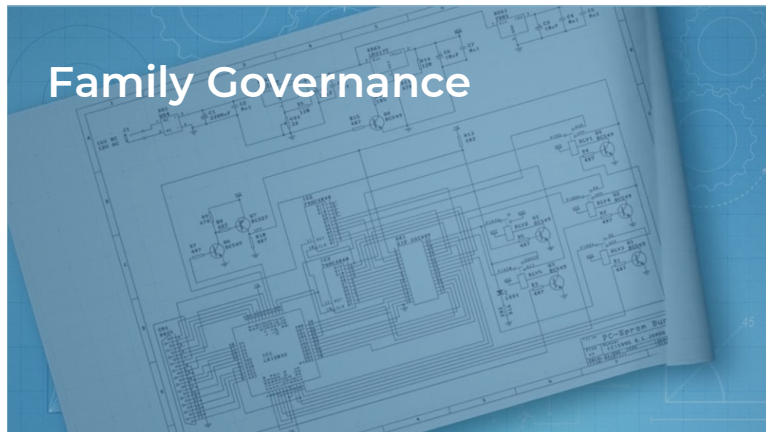
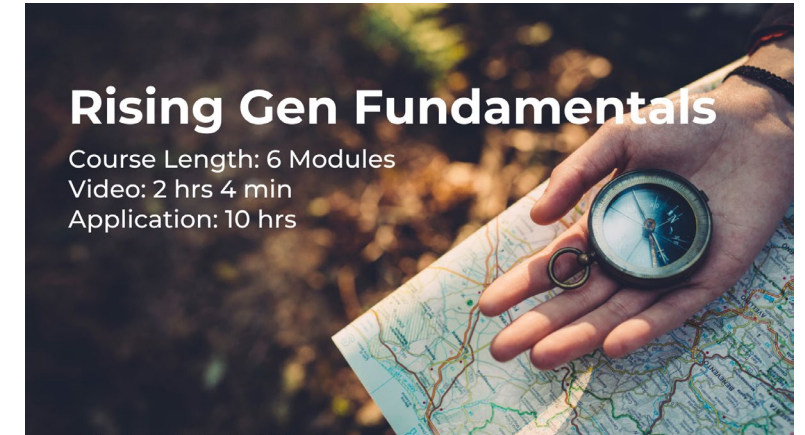
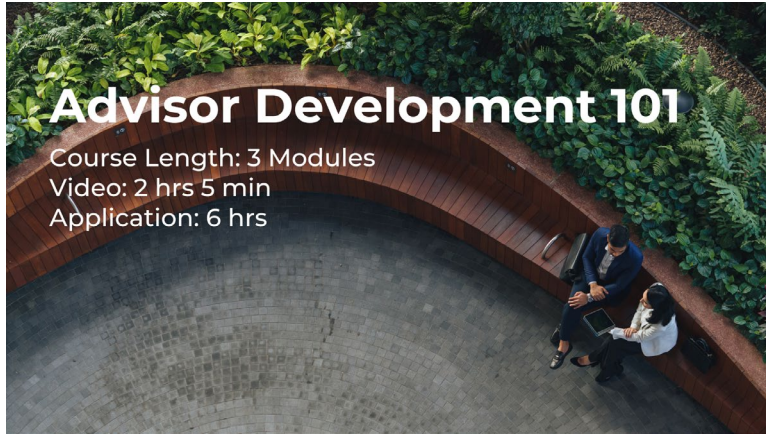
A business founder that had been active in direct investing since she sold her first successful business had a high tolerance for risky venture investments. She had put trusts in place for her children and grandchildren before the business was sold that provided lifetime financial security for the children and grandchildren. But as the younger generations became adults, and more spouses were brought into the discussion, the appetite for risk-taking shifted for some of the children and grandchildren. They didn't have the business experience of the matriarch, and they felt unprepared to manage investments in early stage companies.

As the founder planned her retirement, she wondered what degree of complexity the family could manage without her, and how the investment should be structured. To relieve the anxiety that was growing in the family, the founder decided to sell the direct investments before she retired, and she restructured her family assets into an investment partnership that could be managed by professionals using a traditional asset allocation model to diversify risk, much like an endowment model for investing.

Gen 3 was relieved by this decision, and eager to learn how to oversee an investment portfolio of public securities where they were not personally responsible for making sophisticated investment decisions.

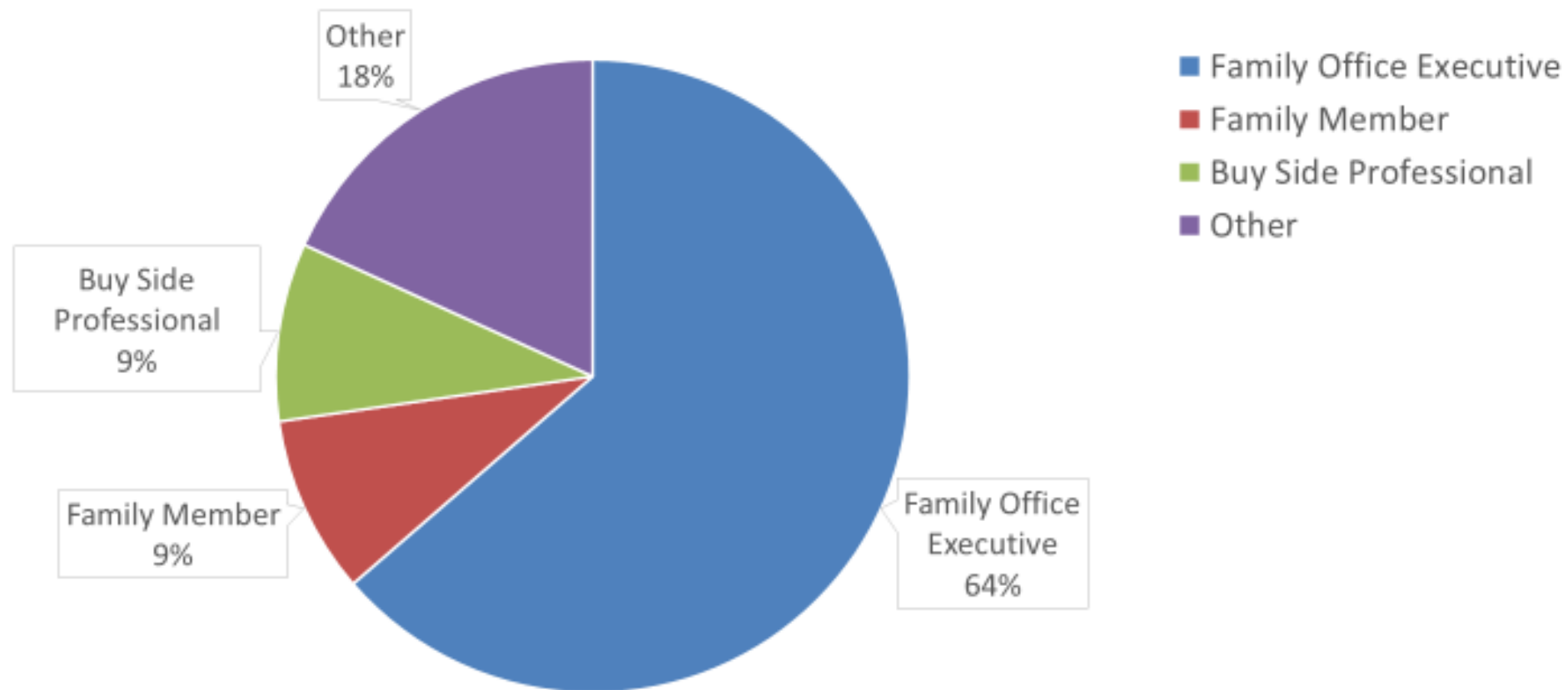


# E-learning





2024 FOX Technology Showcase - ATTENDEES



2024 FOX Technology Showcase - SAMPLE COMMENTS ABOUT DEMONSTRATIONS – ***“Was this event helpful for you and your organization?”***

*“Yes. I could not attend to all Demos, but the ones I went to were helpful. Demos gave me a better idea of what is out there, and how that might help us improve our current way of doing things”*

*“Yes! It was terrific to meet such a variety of technology firms to understand their specific capabilities and expertise all in one place.”*

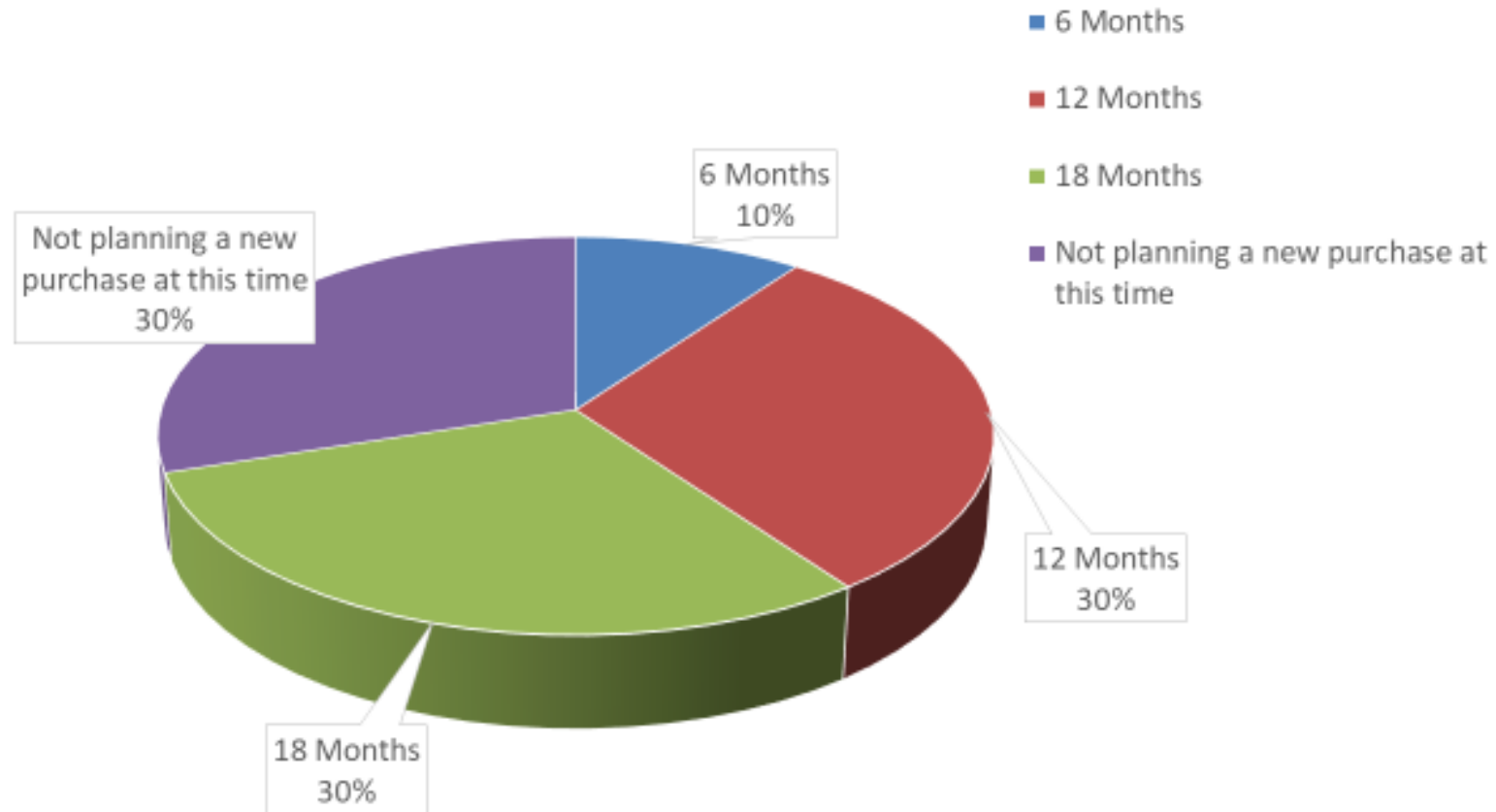
*“100%. Allowed us to drill down deeply into each vendor. It’s a must have!”*

*“It was great to learn about the various products and also speak with other family offices about similar pain points and how they have solved them.”*

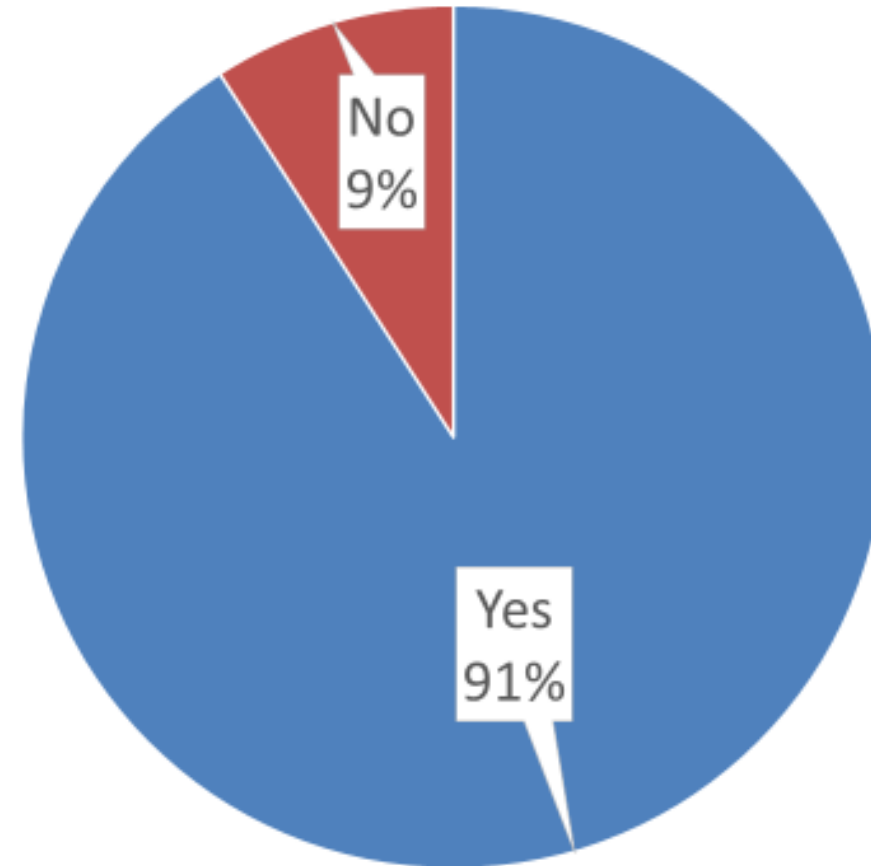
*“Yes, because we were able to see the interface and its features to determine which options would be a potential fit for our family office.”*

*“yes, got to see technology I either didn't know existed or wasn't seeking a solution for.”*

## 2024 FOX Technology Showcase - PLANS FOR NEW TECHNOLOGY IMPLEMENTATIONS



2024 FOX Technology Showcase - DO YOU INTEND TO FOLLOW UP WITH PRESENTING VENDORS?







## 2025 FOX Technology Showcase - NASHVILLE – SEPTEMBER 9 thru 11

# Risk Management Summit

October 9-10, 2024  
Virtual

Register at:  
[familyoffice.com/RMS24](https://familyoffice.com/RMS24)



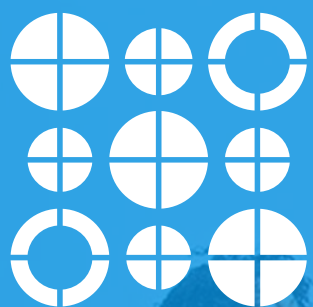
# Family Office Design Workshop

November 18-21, 2024 | Virtual

Register at:  
[familyoffice.com/FODW24](https://familyoffice.com/FODW24)







# ROEF

## ACADEMY

2025 Cohort Starts  
Jan. 27 in Miami

Register at:  
[familyoffice.com/ROEF25](https://familyoffice.com/ROEF25)



## Upcoming Events

Risk Management Summit   Virtual	Oct. 9 – 10
Rising Gen at the Family Forum   Atlanta, GA	Oct. 27 – 28
Family Forum   Atlanta, GA	Oct. 28 – 30
Member Webcast: The Why, What, and How of Family Governance	Nov. 6
Technology Resource Partner Focus Group – TIFIN Give	Nov. 7
Member Webcast: Overlooked and Misunderstood: Common Tax and Estate Pitfalls	Nov. 13
Family Office Design Workshop   Virtual	Nov. 18 – 21
2025 ROEF Academy   Amsterdam, Miami, & Virtual Modules	Starts Jan. 27
2025 Private Trust Company Workshop   Virtual	Jan. 28 – 30
2025 Enterprise Family Workshop   In Person, Miami	Feb. 5 - 7
2025 Rising Gen Leadership Program: Topaz Edition   Nashville, TN	Mar. 21 – 22

To learn more about our upcoming events, or to register,  
please visit [familyoffice.com/learning-programs](https://familyoffice.com/learning-programs)

# FOX Community Builder Award

The purpose of the award is to recognize members of the FOX community who have distinguished themselves through extraordinary achievements in business, the professions, civic engagement, and is a member or former member known to FOX.



The nomination window is now open — please recommend your qualified candidate(s) today. The winners (1 Advisor and 1 Family Office Executive) will be announced at the FOX Family Forum on October 28-30 in Atlanta.

60+ EPISODES

# FOXCast

## CEO SERIES

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[familyoffice.com/podcasts](https://familyoffice.com/podcasts)

