**Trustees and Beneficiaries Workshop**

Virtual Event
Oct. 1-2, 2025

## This workshop is one of the very few places trustees and beneficiaries get the high-quality, objective, and non-commercial training they need to fulfill their roles in an informed and confident way.

This unique workshop is designed to help trustees and beneficiaries be better prepared and develop stronger relationships. The workshop covers the roles, risks and responsibilities of both trustees and beneficiaries so both trustees and beneficiaries are strongly encouraged to attend.

FOX Family Office Exchange

# Trustees and Beneficiaries Workshop

Virtual Event
Oct. 1-2, 2025

## WHO SHOULD ATTEND

Personal trustees serving as fiduciaries for family trusts and the beneficiaries of the family trusts.

## SCHEDULE

*All times listed are in U.S. Central Time and subject to change.*

- Wednesday, Oct. 1 | 10:00 am – 4:00 pm
- Thursday, Oct. 2 | 10:00 am – 3:45 pm

### To Register and Learn More

To see the full agenda and register, visit us online at **familyoffice.com/TB25** or contact your relationship manager. For questions, please contact us at **events@familyoffice.com**.

**Register by August 27, 2025 to receive $300 off of your registration**

| | MEMBER | NON-MEMBER |
|---|---|---|
| Individual Attendee | US $2,500 | US $3,000 |
| Multiple Attendees | US $2,250 | US $2,700 |

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## AGENDA OVERVIEW

All times listed are in U.S. Central Time and subject to change.

### WED, OCT. 1

10:00 AM
**Welcome and Program Introduction**

10:15 AM
**A Discussion on Beneficiary Well-Being**

11:15 AM
**Introduction to Trusts: Structure, Roles, Types, and Desirable Features**

12:30 PM Lunch Break

1:00 PM
**Crash Course for Trustees and Beneficiaries: Responsibilities, Powers, Rights, and Wishes**

2:00 PM
**Distribution Provisions: Understanding the Issues and Options**

3:00 PM
**Trustees and Beneficiaries – How Does it Really Work?**

4:00 PM Day 1 Concludes

### THURS, OCT. 2

10:00 AM
**Introductions and Recap of Day 1**

10:05 AM
**Fiduciary Disputes in Family Held Enterprises**

11:00 AM
**Building Life-Enhancing Relationships with Beneficiaries: An Independent Trustee's Perspective**

12:00 PM
**Selecting the Right Trustee and Role of Trust Protectors within the Trust World**

1:00 PM Lunch Break

1:30 PM
**Managing Fiduciary Risk**

2:30 PM
**Bringing it All Together**

3:30 PM Closing Remarks

3:45 PM Workshop Concludes

### CPE Credit

Up to 10 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.