Family Office Exchange®

2017 FOX FALL FORUM™

Family Journeys

TRAVELING WITH INTENTION

October 23-25 | JW Marriott | Chicago

The Rookery Building | Oriel Staircase | Chicago

Family Journeys: Traveling With Intention

As we travel through life, the people we meet, the things we learn, and the goals we set influence our paths. The experiences we collect along the way and the stories we tell about them connect our past to our present and help us set a course for the future.

At this year's FOX Fall Forum, we'll hear from families who have found meaning and purpose in their journeys and can guide us with their wisdom. We'll also examine best practices and strategies that families who are traveling with intention can use as roadmaps.

Join us for the wide range of stimulating sessions and the opportunity to see old friends and network with new ones in our unique peer community.

Accommodations

JW Marriott Chicago

151 West Adams Street, Chicago, IL 60603 | Phone: 312.660.8200

FOX has reserved a limited number of rooms at the JW Marriott Chicago at a rate of $324 per night plus applicable taxes (currently 17.4%). To obtain this discounted rate, please contact the JW Marriott Chicago directly at 1.877.303.0104 and mention the "Family Office Exchange" or complete your reservation online at:

https://aws.passkey.com/go/FamilyOfficeFallForum

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 Thursday, September 28, 2017.

Agenda at a Glance

Monday, October 23

Families, FO Executives, and FOX Thought Leaders Council

- **9:30 a.m.** Registration
- **10:30 a.m.** First Time Attendee Orientation and Networking Session
- **12:30 p.m.** Luncheon & Seminar Introductions
- **2:00 p.m. to 5:00 p.m.** Family Seminars
  - Preparing the Individual, the Family, and the Family Business for the Future
  - Family Learning Programs: Designing for Engagement
  - Building Trust in the Family Owner Group: Clarifying Roles and Aligning on Goals
  - Skin In The Game: A Creative Approach for Entrepreneurs to Raise Capital
  - Putting Data into Action: Analyzing Key Components of Your Family Office
- **6:00 p.m.** Rising Generation of Leaders Reception
- **6:30 p.m.** Cocktail Reception and Dinner for Family Members, Office Executives, and FOX Thought Leaders Council™

Tuesday, October 24

All FOX Members

- **8:00 a.m.** Breakfast and Registration
- **9:00 a.m.** Designing the Family Journey
- **9:20 a.m.** FOX Insights: Taking An Imagineer's Approach to the Future
- **10:10 a.m.** Changing Course: The Fink Family's Journey From Business Innovators to Impact Investors
- **11:30 a.m.** Generational Transitions Journey
- **12:30 p.m.** Luncheon
- **1:30 p.m.** Family and Advisor Member Peer Dialogue Sessions
- **3:30 p.m. to 5:00 p.m.** Breakout Sessions
  - A Rising Generation Redefines the Family Vision
  - Age Healthy, Wealthy & Wise
  - Impact through Direct Investing – Wisdom from the Trenches
  - Steering the Conversation on Business Succession
  - Goals-Based Framework for Risk Management – Case Study
  - Security Strategies for Sophisticated Families
- **7:00 p.m.** All Member Dinner at the Chicago History Museum

Wednesday, October 25

All FOX Members

- **8:00 a.m.** Breakfast and Registration
- **9:00 a.m.** Opening Remarks
- **9:10 a.m.** Eliminating Drama in Your Family
- **11:00 a.m.** Navigating the Family Enterprise Brand and Culture in a Chaotic World
- **11:50 a.m.** The Aspirational Investor: Achieving Your Life's Goals
- **12:45 p.m.** Grab 'n Go Lunch

Vlad Barbieri
Partner, BanyanGlobal

Anna Belyaev
COO, *Skin in the Game*

Charlie Carr
US Family Enterprises Advisory Leader, PwC

Greg Cessna
CEO, Northbound Consulting

Ashvin Chhabra
President, Euclidean Capital, Author, *The Aspirational Investor*

Jim Dethmer
Co-Founder, The Conscious Leadership Group, and Author, *The 15 Commitments of Conscious Leadership*

Coventry Edwards-Pitt, CFA, CFP®
Chief Wealth Advisory Officer, Ballentine Partners, LLC

Mike Fernandez
CEO, Burson-Marsteller

Betsy and Jesse Fink
Founders, Marshall Street Management

Jonathan Flack
US Family Business Services Leader, PwC

Rob Gray
Senior Director of Operations and Executive Security, Cox Enterprises

Marion McCollom Hampton
Founder and Senior Partner, BanyanGlobal

Katherine Hayes
Chair of the Board, HRK Trust Company

Brayden King
Chair of Management and Organizations Department, Kellogg School of Management, Northwestern University

Jill Koosmann
President & CEO, HRK Group, Inc.

Sanjeev Krishnan
Managing Director, S2G Ventures

Nicole Loftus
Founder & CEO, *Skin in the Game*

John Lugiano
President, MPS LLC

Josh Mailman
Founder and Managing Director, Serious Change LP

Mary-Hunter McDonnell
Assistant Professor of Management, The Wharton School, University of Pennsylvania

Tony Michaels
Chief Executive Officer, Midwestern Bio Ag

W. Jackson Parham, Jr., CFA
Chief Investment Officer, Eton Advisors

Mitzi Perdue
Author, *How to Make Your Family Business Last*

Elizabeth Carlock Phillips
Executive Director, Phillips Foundation

Eric Powell
Chief Security Officer, Bayshore Global Management LLC

Shally Shanker
Founder and CEO, AiiM Partners
(Alpha Impact Investment Management)

Kate Tilney
Chair of the Board, HRK Group, Inc.

Michael Whelchel
Co-Founder & Partner, Big Path Capital

Family Office Exchange Presenters

Amy Hart Clyne
Executive Director, Knowledge Center

Ann Dugan
Senior Managing Director, Consulting

Jane Flanagan
Managing Director

Tony Gebely
Chief Technology and Integration Officer

Charles B. Grace, III
Managing Director

Sara Hamilton
Founder & CEO

Mariann Mihailidis
Managing Director, Councils

Alexandre Monnier
President

Miguel López de Silanes
Market Leader for Europe and Latin America

Monica Staco
Director of Research

9:30 a.m. **Registration**

10:30 a.m. **First Time Attendee Orientation and Networking Session**

Attending a conference with your closest peers is a tremendous networking opportunity, so how do you make the most of it? This orientation and networking session is a great way to quickly and effectively get to know your fellow Forum attendees. Come to this session to hear about all that FOX offers and meet the relationship managers and other members of the FOX team with whom you will be working. FOX staff members will be on hand to get you oriented to your first FOX Forum experience.

12:30 p.m. **Luncheon & Seminar Introductions**

2:00 p.m. to 5:00 p.m. Family Seminars

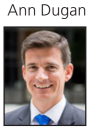
Please choose one of five seminars. Seminars are open to Family Members, Family Office Executives, and FOX Thought Leaders Council™ members.

Seminar 1: Preparing the Individual, the Family, and the Family Business for the Future


Mitzi Perdue


Greg Cessna


Ann Dugan


Miguel López de Silanes

Presenters: Mitzi Perdue, Author, *How to Make Your Family Business Last*; Greg Cessna, CEO, Northbound Consulting

Facilitators: Ann Dugan, Senior Managing Director, Consulting, Family Office Exchange; Miguel López de Silanes, Market Leader for Europe and Latin America, Family Office Exchange

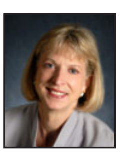
Successful business-owning families know that a set of timely decisions is required to continually prepare and grow the family-operating companies. For the long-term success of the family, timely and thoughtful exploration of future planning for self and family is also required, but often overlooked. This session presents ideas and best practices for strategically planning for the lasting success of individuals, family, and business, while recognizing the complex intertwining of the three.

Part 1
The Complex Intertwining of Self, Family, and Business

Part 2
Communication Techniques and Governance Structures

Part 3
Effective Preparation and Inclusion of Family and Business Stakeholders

Seminar 2: Family Learning Programs: Designing for Engagement


Sara Hamilton


Jane Flanagan

Facilitators: Sara Hamilton, Founder & CEO, Family Office Exchange; Jane Flanagan, Managing Director, Family Office Exchange; Joined by FOX Member Panelists

Many FOX members have come to realize that effective education programs don't just happen, they are creatively designed with specific outcomes in mind. Come to this session to hear from several chief learning officers who are positively impacting their families by designing engaging experiential programs for each generation. Program overviews and learning modules designed and used by three families will be featured. There will also be an important discussion about managing learner expectations and how you can address these issues in a constructive manner to improve empathy and engagement with rising-generation owners.

Part 1
Overview of family learning programs being used and sample presentations for family learning modules

Part 2
An explanation of how to manage learner expectations and incorporate different learning styles in program development

Seminar 3

Building Trust in the Family Owner Group: Clarifying Roles and Aligning on Goals

Marion McCollom Hampton

Vlad Barbieri

Presenters and Facilitators: Marion McCollom Hampton, Founder and Senior Partner, BanyanGlobal; Vlad Barbieri, Partner, BanyanGlobal

Family businesses transitioning from the owner-manager stage to a larger and more diverse family ownership group often lack the practices necessary to assure owner alignment and avoid conflict. Many times, owner groups are perched on the lip of what we call the "conflict spiral," ready to descend into fractured communication and hostile relationships. Our presenters have found that the "four-room model" provides a clear and practical perspective on how governance and decision-making can evolve in successful family enterprises. Creating a space for owners to receive information, interact, learn, discuss, and make appropriate decisions is often key to building trust in what otherwise can be a fractured and politicized group of owners. This topic will be explored using a short case and discussion groups.

Part 1

Building trust through building out the "four-rooms" of governance

Part 2

Recognizing traps in owner groups that damage trust and foster conflict

Seminar 4

Skin In The Game: A Creative Approach for Entrepreneurs to Raise Capital

Nicole Loftus

Anna Belyaev

Facilitators: Nicole Loftus, Founder & CEO, *Skin in the Game*; Anna Belyaev, COO, *Skin in the Game*

In *Skin in the Game*, a proposed TV show with a format similar to *Shark Tank*, the audience effectively runs the game, deciding which businesses get funded. Audience members also have the option to invest their own capital in the *Skin in the Game* fund. More than fun and games, it was designed with projections for job creation and economic development in mind, and the success of these crowd-funded deals will be published and discussed on each show. In this informative and interactive session, you'll gain insights on investment opportunities that conventional private equity funders are missing. You'll also learn about the process for attracting and vetting opportunities that align with your investment objectives and values.

Part 1

Skin in the Game Business Model

Part 2

Selecting Candidates for Venture Capital Funding

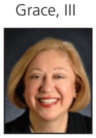
Part 3

Critique of Two Venture Companies

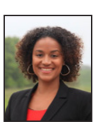
Seminar 5

Putting Data into Action: Analyzing Key Components Of Your Family Office

Charles B. Grace, III



Mariann Mihailidis



Monica Staco

Presenters and Facilitators: Charles B. Grace, III, Managing Director, Family Office Exchange; Mariann Mihailidis, Managing Director, Councils, Family Office Exchange; Monica Staco, Director, Research, Family Office Exchange

If you're looking for ways to compare your family office performance and demonstrate the value the office provides, this session is for you. FOX Benchmarking is designed to help participants celebrate their successes and identify changes to improve performance. Find out how data and insights from the newly released FOX Family Office Study apply to your office. In roundtable discussions, explore topics such as the central role of family goals and office purpose, as well as governance, risk management, family member experience, cost and complexity, investing trends, staff experience, and development.

Part 1

Highlights from Single-Family Office Research

Part 2

Roundtable Discussions

- Goal Setting and Strategic Planning
- Oversight and Governance for the Office
- Family Office Costs
- Scope of Services and Service Delivery
- Metrics and Benchmarking Office Performance

6:00 p.m. Rising Generation of Leaders Reception

This reception is reserved for family members in their 20s-40s who are aspiring leaders within their family's enterprise.

6:30 p.m. Cocktail Reception and Dinner for Family Members, Office Executives, and the FOX Thought Leaders Council™ at the JW Marriott

Agenda: Tuesday, October 24

8:00 a.m. **Breakfast and Registration**

9:00 a.m. **Designing the Family Journey**

Sara Hamilton, Founder & CEO, Family Office Exchange

9:20 a.m. **FOX Insights: Taking An Imagineer's Approach to the Future**

Amy Hart Clyne

Alexandre Monnier

Presenters: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange; Alexandre Monnier, President, Family Office Exchange

Imagine what the year 2030 might look like for you and the people you serve. What key trends must be watched as we anticipate the world over the next 10 to 15 years? As a community dedicated to providing for families of substantial wealth, what can we do today to not only plan for, but also influence our shared future? How can we focus our thinking and our efforts? These are some of the questions explored at the 2017 FOX Thought Leaders Council Summit. In this session, you will examine the 4 key themes that surfaced as high-priority and require immediate attention. We will describe how these themes impact the private wealth owner community and how we might want to put them in our line of vision as we look ahead.

10:10 a.m. **Changing Course: The Fink Family's Journey From Business Innovators to Impact Investors**

Jesse and Betsy Fink

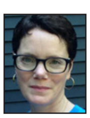
Presenters: Betsy and Jesse Fink, Founders, Marshall Street Management

Moderator: Sara Hamilton, Founder & CEO, Family Office Exchange

Long before they were founders of Priceline.com, Betsy and Jesse Fink shared a passion for environmental solutions. Post IPO, they chose to focus more deeply on their early interests by building an integrated, systemic approach for identifying and solving environmental issues. They also became early adopters and field builders of venture philanthropy and impact investing. Betsy and Jesse will share stories and lessons learned from starting an impact investment firm (MissionPoint Partners), creating a sustainable farm (Millstone), and starting a U.S. non-profit focused on food waste (ReFED). Hear how these experiences have influenced their views on wealth ownership and the meaning of prosperity, as well as how values are created and family dynamics are shaped in a first generation family.

11:00 a.m. **Networking Break**

11:30 a.m. **Generational Transitions Journey**



Jill Koosmann

Katherine Hayes

Kate Tilney

Presenters: Jill Koosmann, President & CEO, HRK Group, Inc.; Katherine Hayes, Chair of the Board, HRK Trust Company; Kate Tilney, Chair of the Board, HRK Group, Inc.

Family office executive, Jill Koosmann, with G5 family members, Katherine Hayes and Kate Tilney, will highlight how the family and office staff worked together to complete a significant generational transition. Learn how they worked together to meet the family's current needs, while respecting the evolution of the family's culture. By addressing questions about where they are going, what business they are in, and how to measure their success, the team learned a great deal in the process. Anyone preparing for a similar journey, or anticipating one in the future, will benefit from hearing about this family's accomplishments and experiences.

12:30 p.m. **Luncheon**

1:30 p.m. Peer Dialogues for Family Members and Family Office Executives

Please choose one:

Private and Direct Investors	Family Business Owners and Enterprising Families	Gen 1 & 2 Families	Gen 3 & 4 Families	Gen 5+ Families

1:30 p.m. Peer Dialogue for Advisors – High Impact Trends

FOX Thought Leaders Council, Multi-Family Office Council, Advisors and Guests

3:00 p.m. Networking Break

3:30 p.m. Breakout Sessions

Please choose one of the following sessions. All breakout sessions will be video recorded and available to FOX members via the FOX Knowledge Center following the Forum.

Breakout 1


Elizabeth Carlock Phillips

A Rising Generation Redefines the Family Vision

Presenter: Elizabeth Carlock Phillips, Executive Director, Phillips Foundation

When FOX member Elizabeth Carlock Phillips assumed leadership of the Phillips Foundation in 2013, she and the trustees moved deliberately and with great passion to re-align the corpus as well as the grant-making function of the foundation with their family values. In order to do so, she sought out new relationships with impact-oriented financial advisers and other experts to help achieve the family's goals. Today, the Phillips family's vision, mission, and values-orientation is guiding not only the family's foundation assets, but also their family operating businesses and their broader investment strategy.

In this session, Elizabeth will share highlights from this journey, including the steps she and her husband, as rising generation family leaders, have taken to redefine Phillips Enterprises for the next era.

Breakout 2


Coventry Edwards-Pitt, CFA, CFP®

Age Healthy, Wealthy & Wise

Presenter: Coventry Edwards-Pitt, CFA, CFP®, Chief Wealth Advisory Officer, Ballentine Partners, LLC

Longevity is a gift only if you know how to use it. Covie will share insights from vibrant elders about the factors that allowed them to design meaningful later lives as well as the best practices that each of us can put in place today to ensure that our aging impacts our families more positively than negatively.

Covie will lead us through a planning process to help families get started, based on how she has observed other families successfully navigate the longevity journey.

Breakout 3


Sanjeev Krishnan


Josh Mailman


Tony Michaels


Shally Shanker


Michael Whelchel

Impact Through Direct Investing – Wisdom from the Trenches

Presenters: Sanjeev Krishnan, Managing Director, S2G Ventures; Josh Mailman, Founder and Managing Director, Serious Change LP; Tony Michaels, Chief Executive Officer, Midwestern Bio Ag; Shally Shanker, Founder and CEO, AiiM Partners (Alpha Impact Investment Management)

Moderator: Michael Whelchel, Co-Founder & Partner, Big Path Capital

Like the Fink Family, a growing number of families are investing directly into impact companies and for good reason. There are great investment opportunities and investors can pick the specific type of positive impact they would like to see (sustainable fishery, renewable energy, financial inclusion, etc.). But investing directly into companies efficiently and effectively requires a different acumen and infrastructure than investing in public markets.

This panel will bring together two veteran family investors who have deep experience investing in direct deals and two CEOs of companies who have received capital from family offices to share their wisdom born from their experience. Attend this session for lessons learned, tips, and practical how-to's.

Breakout 4

Steering the Conversation on Business Succession

Charlie Carr

Jonathan Flack

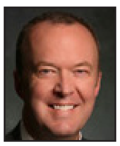
Presenters: Charlie Carr, US Family Enterprises Advisory Leader, PwC; Jonathan Flack, US Family Business Services Leader, PwC

Learn how non-family business executives can lead discussions on succession and why you may want to facilitate this process. In this session, Charlie and Jonathan will share data and case studies from successful (and unsuccessful) successions at leading family enterprises and engage in a group discussion to help answer the following questions:

- What does succession really mean for the business and family leadership?
- What guidelines should you employ for ownership succession and passing shares, as well as governance succession of board positions?
- How are you preparing the next generation for leadership succession and what tactics are you employing for the estate?
- What does the 'missing middle' mean to a family business's strategic plan and how can it affect the succession process?

Breakout 5

Goals-Based Framework for Risk Management – Case Study



W. Jackson Parham, Jr., CFA

Presenter: W. Jackson Parham, Jr., CFA, Chief Investment Officer, Eton Advisors

Families of exceptional wealth enjoy abundant resources to achieve family goals, but also face peculiar, idiosyncratic risks not easily managed through traditional means. This session explores a framework for managing those risks while taking advantage of the unique edge which families can have over other investors.

In this session, an experienced goals-based investment strategist describes how working with a single-family office founder to address the unique risk needs and investment goals of the family led to the joint development of a simple but powerful framework for managing family risks. In combining family advisory roles, the family's insurance industry experience, and family goals, Jack describes how wealthy families can gain valuable insight by adopting the perspective and tools utilized by insurance and reinsurance providers to manage major risks. Acquiring this inside perspective and viewing the family portfolio conceptually as the insurer of family goals can be useful in crafting customized solutions to address extraordinary risks.

Breakout 6

Security Strategies for Sophisticated Families

Rob Gray

John Lugiano

Eric Powell

Presenters: Rob Gray, Senior Director of Operations and Executive Security, Cox Enterprises; John Lugiano, President, MPS LLC; Eric Powell, Chief Security Officer, Bayshore Global Management LLC

Moderator: Tony Gebely, Chief Technology and Integration Officer, Family Office Exchange

As new social and geopolitical conflicts arise, threats to a family's security and well-being change. This landscape has materially shifted over the last few years and, as a result, families need to be prepared to address a variety of personal, physical, and cyber risks.

In this session, family security directors from three single family offices will share strategies they use to protect the interests of the global, multigenerational families who employ them. They'll also share the latest updates from the security front, including top issues families should be concerned about, and the latest best practices and technologies used to mitigate risk.

5:00 p.m. Adjournment

7:00 p.m. All Member Dinner at the Chicago History Museum

Join us for a dinner with your peers at the Chicago History Museum, home to the Chicago Historical Society, the city's oldest cultural institution devoted to collecting, interpreting, and presenting the rich multicultural history of Chicago. Shuttle service will be provided.

8:00 a.m. **Breakfast and Registration**

9:00 a.m. **Opening Remarks**

9:10 a.m. **Eliminating Drama in Your Family**

Jim Dethmer

Presenter: Jim Dethmer, Co-Founder, The Conscious Leadership Group, and Author, *The 15 Commitments of Conscious Leadership*

All families have drama. However, in complex family and family-business environments, the toxic residue the drama leaves can't easily be tolerated. Fortunately, we know the antidote: conscious, trust-based leadership. In this session, Jim Dethmer, advisor and co-author of *The 15 Commitments of Conscious Leadership*, will facilitate an interactive experience to help attendees identify the sources of family drama and the roles they play. He will also explain how to reduce drama by shifting from fear-based to trust-based leadership, which promotes greater collaboration, energy, and engagement in the family.

10:30 a.m. **Networking Break**

11:00 a.m. **Navigating the Family Enterprise Brand and Culture in a Chaotic World**

Mike Fernandez

Mary-Hunter McDonnell

Brayden King

Panelists: Mike Fernandez, CEO, Burson-Marsteller; Mary-Hunter McDonnell, Assistant Professor of Management, The Wharton School, University of Pennsylvania

Moderator: Brayden King, Chair of Management and Organizations Department, Kellogg School of Management, Northwestern University

Increasingly, companies of all stripes are being stressed to manage their reputations in a world that is always on, more social, and more contentious than ever. The problems faced can be even more challenging for family-owned businesses. Family members and businesses are increasingly asked to take stands on social concerns and political issues by the media, community leaders, and employees. Meanwhile, family members' personal preferences and actions are exposed on the worldwide stage for public scrutiny, placing family reputations on the line.

This panel—featuring one of the top academic researchers on brands, companies, and society and one of the top public relations professionals in the world—will seek to address and answer your questions on how best to manage a family brand and reputation in these chaotic times.

11:50 a.m. **The Aspirational Investor: Achieving Your Life's Goals**

Ashvin Chhabra

Presenter: Ashvin Chhabra, President, Euclidean Capital, Author, *The Aspirational Investor*

The most important risk to a family is not meeting your goals, not loss in your portfolio, according to Ashvin Chhabra, author of *The Aspirational Investor*. Ashvin will offer a practical, innovative framework for making smarter choices about aligning your goals to your investment strategy. Chhabra reveals some surprising facts about wealth creation, reinterprets the success formulas of investing greats like Warren Buffett, and closes the gap between theory and practice by laying out a concise roadmap for identifying, prioritizing, and quantifying financial goals that incorporates wealth preservation and wealth creation.

12:45 p.m. **Grab 'n Go Lunch**

Exhibitors

ADDEPAR · FundCount · Home Care Assistance · PCR · SEI ARCHWAY

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: Finance - Up to **11.5 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.

Program Level: Overview | No prerequisites are required for any of the sessions.
Delivery Method: Group Live Program

Learning Objectives: Upon completion of the program, participants will have an understanding of the best practices and strategies successful families have utilized on their family journeys when addressing topics, such as: family engagement, business processes, succession planning, impact investing, direct investing, family security, and risk management.

Registration Form

FOX Fall Forum™ | October 23-25, 2017

Register online at www.familyoffice.com/ff

Scan and email to events@familyoffice.com

Fax this form to our Events Team at 312.327.1212

Attendee Information

Name (First/Last)

Nickname (For event nametag if different than above.)

Title

Firm Name

Street Address

City State/Province

Country Zip/Postal Code

Phone

E-mail

Please select one: I am a

- ❍ Wealth Owner or Family Member
- ❍ Family Office Executive
- ❍ FOX Thought Leaders Council™ Member

Are you a:

❍ FOX Member ❍ Prospective FOX Member ❍ Other

If you are a Family Leader/Wealth Owner please select your generation:

❍ Gen 1 ❍ Gen 2 ❍ Gen 3 ❍ Gen 4 ❍ Gen 5 or Greater ❍ NA

What key problem or priority are you trying to solve?

Is this your first time attending the FOX Fall Forum?

❍ Yes ❍ No

Will you stay at the JW Marriott during the FOX Fall Forum?

Attendees are responsible for reserving their own accommodations for the Forum.

- ❍ Yes, I plan to stay at the JW Marriott
- ❍ No, I do not plan to stay at the JW Marriott
- ❍ Not sure, my plans are not finalized

How would you like to receive your Forum materials?

Additional binders will not be available onsite.

- ❍ I would like to download the materials in advance and will NOT need a binder
- ❍ I would like to receive materials in a binder at the Forum

Do you have any special dietary or accessibility needs?

Registration Fees

Wealth Owners, Family Members and/or Family Office Executives | **FOX Thought Leaders Council**

FOX Member	Non-Member	FOX TLC Member
☐ Use Event Credit Included in FOX Membership	☐ First Attendee $2,850	☐ Use Event Credit Included in FOX Membership
☐ First Paid Attendee $2,300	☐ Additional Paid Attendees $2,400	
☐ Additional Paid Attendees $1,950		

Payment Method

❍ Payment by check is enclosed. *(Check payable in U.S. dollars to Family Office Exchange)*

Please mail check to: **Family Office Exchange ATTN: Events**
100 S Wacker Drive, Suite 800, Chicago, IL 60606

❍ Please charge the following credit card: ❍VISA ❍MasterCard ❍AmEx ❍Disc

Cardholder Name

Card Number Exp. Date Security Code

Billing Address for Credit Card

City State/Province Zip/Postal Code Country

Cardholder's Signature

Seminar and Session Selections

Monday, October 23

Will you attend the following?

- ❍ First Time Attendee Orientation and Networking Session at 10:30 a.m.
- ❍ Luncheon at 12:30 p.m.
- ❍ Rising Generation of Leaders Reception at 6:00 p.m.
  This reception is reserved for family members in their 20s-40s who are aspiring leaders within their family's enterprise.
- ❍ Cocktail Reception and Dinner for Family Members, Office Executives, and FOX Thought Leaders Council Members at 6:30 p.m.

Which family seminar will you attend on October 23 at 2 p.m. - 5 p.m.?

- ❍ 1. Preparing the Individual, the Family, and the Family Business for the Future
- ❍ 2. Family Learning Programs: Designing for Engagement
- ❍ 3. Building Trust in the Family Owner Group: Clarifying Roles and Aligning on Goals
- ❍ 4. Skin In The Game: A Creative Approach for Entrepreneurs to Raise Capital
- ❍ 5. Putting Data into Action: Analyzing Key Components of Your Family Office
- ❍ I will not attend a family seminar

Tuesday, October 24

Will you attend the following?

- ❍ Breakfast at 8:00 a.m.
- ❍ Luncheon at 12:30 p.m.
- ❍ All Member Dinner at the Chicago History Museum at 7:00 p.m.

Choose one of the Peer Dialogue Sessions at 1:30 p.m.:

For Family Members and Family Office Executives

- ❍ Private and Direct Investors
- ❍ Family Business Owners and Enterprising Families
- ❍ Gen 1 & 2 Families
- ❍ Gen 3 & 4 Families
- ❍ Gen 5+ Families
- ❍ I will not attend a Peer Dialogue Session

Will you attend the Advisor Peer Dialogue Session at 1:30 p.m.?

❍ Yes ❍ No

Choose one Breakout Session at 3:30 p.m.:

(All breakout sessions will be video recorded.)

- ❍ 1. A Rising Generation Redefines the Family Vision
- ❍ 2. Age Healthy, Wealthy & Wise
- ❍ 3. Impact through Direct Investing – Wisdom from the Trenches
- ❍ 4. Steering the Conversation on Business Succession
- ❍ 5. Goals-Based Framework for Risk Management – Case Study
- ❍ 6. Security Strategies for Sophisticated Families
- ❍ I will not attend a Breakout Session

Wednesday, October 25

Will you attend the following?

- ❍ Breakfast at 8:00 a.m.

For event registrations, refunds of payment or forum credits will be offered if the cancellation is made in writing to Family Office Exchange at **events@familyoffice.com** five (5) or more business days prior to the start of the event. For more information regarding complaints or administrative policies please call 312-327-1200.

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