

**FOX  
FAMILY OFFICE  
AND WEALTH  
ADVISOR FORUM**

July 10–12, 2023  
Chicago, IL & Virtual

This forum will bring together family office executives and advisors in the UHNW industry to discuss the most critical challenges and opportunities impacting professionals in family offices and wealth advisory firms, and the clients they serve.

From operational themes such as insurance or tax and estate planning to navigating talent and transition challenges, attendees will walk away with concrete ideas for enhancing their work.

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*“Highly timely topics and excellent speakers discussing how to be better professionals in supporting our families, clients, and teams.”*

—Past Forum Attendee

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## WHO SHOULD ATTEND

In-person registration for this event is for family office and advisor members of FOX.

All FOX Members, and qualified non-members, may attend the program virtually.

For questions regarding eligibility please contact your relationship manager or reach out to [events@familyoffice.com](mailto:events@familyoffice.com)

## IN-PERSON FORUM SCHEDULE

*All times listed in U.S. Central Time*

Monday, July 10 | 10:30 am – 6:30 pm

Tuesday, July 11 | 8:00 am – 7:00 pm

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

## VIRTUAL FORUM SCHEDULE

*All times listed in U.S. Central Time*

Monday, July 10 | 1:30 pm – 5:00 pm

Tuesday, July 11 | 9:00 am – 3:30 pm

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

## KEYNOTE SPEAKER



**Bill Benjamin**  
Partner, Institute for  
Health and Human  
Potential

Bill has a rare perspective – he has advanced degrees in Mathematics and Computer Science and has 25 years of real-world business experience as a senior leader. Bill is very authentic about the fact that he struggled early in his career as a leader when he was under pressure. He shares how he has been able to apply the very same techniques he teaches to become a better leader (and husband and father) himself.

In addition to using his background in sales to motivate and inspire audiences, Bill leverages his Mathematics and technical background to take a practical and scientific approach to help people understand how the brain responds under pressure and how that can help increase leadership and performance. Bill is a partner at the Institute for Health and Human Potential (IHHP), a successful international research and training company, named one of the “Fastest Growing Companies” in the “Fast 100” ranking in PROFIT Magazine. Bill also contributed to the New York Times and Amazon bestselling book *Performing Under Pressure*, co-authored by IHHP’s JP Pawliw-Fry and noted psychologist Hendrie Weisinger.

The combination of Bill’s practical nature and scientific approach to leadership makes him a hit with analytical audiences. His high energy level and enthusiasm have resulted in a successful track record with discerning audiences that include surgeons, U.S. Marines, and NASA engineers.

To view the full forum agendas, visit: [familyoffice.com/learning-programs/forums/2023-fox-family-office-and-wealth-advisor-forum](https://familyoffice.com/learning-programs/forums/2023-fox-family-office-and-wealth-advisor-forum)

## FEATURED SESSIONS

### **Building a Last 8% Culture: Keep Your Best People**

With 40-70% of people contemplating leaving their jobs, the challenge of retaining your best and brightest has never been greater. Yet, with many new hires in your organization and the challenges of a hybrid workplace, you are struggling to re-establish one of the most important levers you have to retain your best and brightest: your culture.

In this powerful live keynote address, your managers and leaders will learn the recent study results from our study of 6,500 leaders across many organizations that looked at what kind of culture makes people want to stay and give discretionary effort in the current environment.

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## TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at [familyoffice.com/FOWAF23](https://familyoffice.com/FOWAF23) or contact your relationship manager. For questions, please contact us at [events@familyoffice.com](mailto:events@familyoffice.com)

	IN-PERSON	VIRTUAL	
	MEMBER	MEMBER	NON-MEMBER
INDIVIDUAL ATTENDEE	Credit or US \$3,500	US \$495	US \$895
MULTIPLE ATTENDEES FROM THE SAME FAMILY OR FIRM	Credit or US \$3,150	US \$495	US \$895

Up to 8.25 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.

## VENUE AND ACCOMMODATIONS

**Swissotel Chicago**  
323 East Upper Wacker Drive  
Chicago, IL 60601

FOX has reserved a limited number of rooms at Swissotel at a discounted nightly rate.

Make your hotel reservation **online** or call 888.737.9477 and reference the Family Office Exchange by June 16, 2023 in order to obtain the special conference rate.  
*(subject to room availability)*

Forum attendees are responsible for making their own accommodation arrangements.

## FEATURED SESSIONS

### Cultivating Qualitative Skills for the Family Advisor of the Future

Family advisors often have a strong technical or financial background, but the importance of cultivating communication style, emotional intelligence, coaching skills, trust-building, and similar qualitative skills to serve clients cannot be overstated. Join a panel of peers who will share how they meaningfully engage with family clients and discuss the invaluable impact of continuous qualitative skill development in family advisors' ever-changing environments.

### 2023 Regulatory, Trust, Tax, and Estate Planning Update

Don't miss this annual in-depth update. A panel of experts will review recent and potential income tax, trust, and estate planning laws, regulations, and cases to discuss managing key challenges and opportunities in 2023. Discover what to watch out for, what to stop worrying about, and what you should consider doing to protect the clients you serve. In addition, a discussion on the Corporate Transparency Act will be included as we look toward 2024 reporting requirements.

### Improving Upon the Employee Experience

As the importance of retaining high-performing employees becomes more apparent in a challenging economy, employers should examine what they are offering to incentivize employees outside of financial compensation. Speakers will share the pros and cons of employee benefits to consider such as hybrid work environments, mental health services, parental leave, nursing mothers' programs, and more. Additionally, company efforts such as DEI and social impact, and developing a consistent culture in the workplace will be addressed.

## FORUM SPONSORS

### PREMIER SPONSOR



### EXHIBITING SPONSOR

