FOX GLOBAL FAMILY OFFICE DESIGN WORKSHOP

December 6-9, 2022
Virtual Event

The FOX Global Family Office Design Workshop covers basic principles of a well-run family office and provides tools and techniques to professionalize the office.

Plus, an extra day on December 6th provides a foundation for exploration for embedded family offices and those still unsure if they want to create their own office vs. partnering with an outside firm.

Attend to learn the basics or get a refresher on how to improve operations of an early stage office and take your office, or the one you are planning, to the next level. With nearly 30 years of collective intelligence, FOX will share best practices regarding what steps to take, when to take them, and how to avoid costly mistakes and setbacks. The workshop will also include time for sharing and discussion about the questions most relevant to attendees.

Very deep bench of knowledge with a lot of actionable items, resources, and best practices. A great seminar for those at all stages!

- Past Workshop Attendee

FOX Family Office Exchange

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WHAT TO EXPECT

- Discover if a dedicated single-family office is right for you, and explore other options
- Understand the critical dimensions of a family office
- Review the range of services that can be provided
- Explore the talent and team structure needed to run an office
- Gain insights into operational challenges and technology solutions
- Learn about the cost of running an office
- Identify methods for oversight
- Discuss global and regional differences that may impact the design and operations
- Review case studies and best practices

PRESENTERS

- **Gabrielle (Gaby) Griffin,** Interim Co-President, Market Leader for Business Owners and Family Office Executive
- **Kent Lawson,** Director of Technology Integration Services
- **Miguel López de Silanes Gómez,** Market Leader International
- **Scott Winget,** Enterprise Market Leader

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at **familyoffice.com/GFOD22** or contact your relationship manager. For questions, please contact us at **events@familyoffice.com**

Family Office Exchange

WORKSHOP-AT-A-GLANCE

The workshop includes FOX proprietary concepts, practical solutions, and data from our recent family office benchmarking survey. The program will be interactive, including presentations, case studies, discussion, and networking with your peers to share individual experiences.

WHO SHOULD ATTEND

Ideal for new family office executives, family members considering starting a family office, or individuals looking to improve operations of an early-stage family office.

AGENDA OVERVIEW *All times listed are in U.S. Central Time*

EXTRA DAY	FAMILY OFFICE DESIGN WORKSHOP		
TUE, DEC. 6	**WED, DEC. 7**	**THU, DEC. 8**	**FRI, DEC. 9**
10:00 am - **Introduction & Expectations**	10:00 am - **Introduction & Expectations**	10:00 am - **Organization & Team Structure**	10:00 am - **Ownership & Governance**
10:30 am - **Why Separate the Family Office from the Business?**	11:00 am - **Family Office Goals & Roles**	11:00 am - **Technology to Support the Family Office**	11:00 am - **Case Study & Action Steps**
11:15 am - **Buy or Build? Wealth Management Options**	12:00 pm - **Break**	12:00 pm - **Break**	12:00 pm - **Break**
12:00 pm - **Group Discussion**	1:00 pm - **Scope of Services & Service Delivery**	1:00 pm - **Complexity & Cost of the Family Office**	1:00 pm - **Initial Design & Next Steps for Your Office**
12:30 pm - **Break**	2:00 pm - **Breakouts**	2:00 pm - **Breakouts**	2:00 pm - **Breakouts**
1:00 pm - **How to Select an MFO or Other Partner**	3:00 pm - **Day 1 Concludes**	3:00 pm - **Day 2 Concludes**	3:00 pm - **Day 3 Concludes**
2:00 pm - **Day Concludes**			

	FOX MEMBERS			NON-MEMBERS		
	DEC. 6	DEC. 7-9	DEC. 6-9	DEC. 6	DEC. 7-9	DEC. 6-9
INDIVIDUAL ATTENDEE	US $800	US $3,000	US $3,500	US $1,000	US $3,750	US $4,375
MULTIPLE ATTENDEES FROM THE SAME FAMILY	US $725	US $2,700	US $3,150	US $900	US $3,000	US $3,950

MODULES

DEC. 6: Family Office/MFO Exploration:
"Do We Want a Single-Family Office?"

Explore Separating the Embedded Office, Starting a New Family Office, and Outsourcing to an MFO.

MODULE 1: Why Separate the Family Office from the Business?
Separating personal from company affairs is an essential best practice for business-owning families and transitioning successfully requires building a roadmap. Establishing a separate family office dedicated to each family member's unique financial needs is a critical first step in managing assets across generations.

MODULE 2: Buy or Build? Wealth Management Options
After deciding to separate, several options exist, from outsourcing all the services to a multi-family office (MFO) to creating your own dedicated single family office (SFO). We will address the reasons you might choose one option, and the pros and cons of each.

MODULE 3: How to Select an MFO or Other Partner
If you've decided to outsource to an MFO, there are still a multitude of choices and types of advisors and firms. We will review how to choose your type, and how to select a particular firm.

DEC 7-9: Global Family Office Design
"Yes, We Want an Office, But How?"

Explore the Critical Elements of a Family Office, Best Practices and Initial Design.

MODULE 1: Family Office Goals & Roles
Defines and introduces building blocks and sophisticated concepts behind family offices including reasons to form and maintain an office, various types, evolution, functions and purpose, and other attributes of offices. The office's central role as risk manager and other roles are introduced.

MODULE 2: Scope of Services & Service Delivery
Sets forth the universe of services provided by family offices and how they are delivered in a customized and integrated manner to meet the technical requirements of managing a family's wealth and enhance family meetings, educate the next generation, among other benefits.

MODULE 3: Organization & Team Structure
Introduces the notion that the values and integrity of the family office staff has the greatest impact on the office's success. This session examines the roles and responsibilities of staff members, organizational structures, mapping of key skills to services, coordination and oversight of third-party advisors, and compensation.

MODULE 4: Technology to Support the Family Office
The Technology of the Family Office is a direct reflection of the family goals, office roles, and scope of services. This session will focus on the architecture of technology that integrates the core aspects of the office and how the overall hub to Technology is the family itself.

MODULE 5: Complexity & Cost of the Family Office
Family offices have a wide range of costs and the important relationship between cost, breadth of service, and complexity will be explored. A review of the Complexity Profiles and its impact on the total cost of wealth management will also be examined.

MODULE 6: Ownership & Governance
Provides an understanding of family office board structures and functions as well as decision-making processes in family offices, with reference to mission, leadership, and succession. Benefits of governance and appropriate degrees of formality are addressed.

MODULE 7: Case Study & Action Steps
Review specific examples of various types of single-family offices and why families will utilize different structures as well as objectives for these offices.

MODULE 8: Initial Design & Next Steps for Your Office
Through concepts and templates provided to participants during the session, this discussion will focus on strategies for designing and refining your family office.

FOX Family Office Exchange