

**FOX  
FAMILY  
FORUM**

October 24-26, 2022  
Atlanta, GA  
and Virtually

At the 2022 FOX Family Forum, family members, office executives, and their trusted advisors will come together to envisage how to address the critical challenges born from the largest wealth transfer in recent history.

This October, FOX is excited to feature special Rising Gen programming within the Family Forum schedule - from exploring pathways of engagement in the family enterprise to a fireside chat with Ray Dalio, this Forum is not to be missed for all members of UHNW families.

If you are joining the event in-person, you can also take advantage of dedicated opportunities to connect with FOX subject matter experts and take advantage of FOX member resources during the networking breaks. All attendees will come away with ideas, tools, and frameworks to ensure a positive and productive enterprise for the future.

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*"The best place to learn about issues facing wealthy families and family offices."*

- Past Forum Attendee

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## WHO SHOULD ATTEND

- FOX members, including family members, family office executives and advisors, are encouraged to experience this forum.
- Please note that forum credits or a registration fee are required to attend in-person. Additional discounts are available for multiple members of your family to attend in-person.
- For questions regarding in-person attendance eligibility please contact your relationship manager.
- All FOX members may attend virtually on their eligible days, with unlimited attendees from your family or firm.

## IN-PERSON FORUM SCHEDULE

*All times listed are in U.S. Eastern Time.*

Monday, October 24 | 11:00 am - 5:30 pm

*Followed by Dinner at 7:00 pm*

Tuesday, October 25 | 8:00 am - 5:15pm

*Followed by Dinner at 7:00 pm*

Wednesday, October 26 | 8:00 am - 12:45 pm

## VIRTUAL FORUM SCHEDULE

*All times listed are in U.S. Eastern Time.*

Monday, October 24 | 1:15 pm - 5:30 pm

Tuesday, October 25 | 9:00 am - 2:00pm

Wednesday, October 26 | 9:00 am - 12:45 pm



## KEYNOTE SPEAKERS



**Ray Dalio**  
Founder, Co-CIO  
and Member of  
the Bridgewater  
Board,  
Bridgewater  
Associates, LP



**Raoul Pal**  
Co-Founder  
and CEO, Real  
Vision Group



**Hester M.  
Peirce**  
SEC  
Commissioner

## FEATURED SESSIONS

### Virtual Fireside Chat with Ray Dalio

Ray Dalio, founder of Bridgewater Associates, will sit down for a conversation with FOX CEO, Peter Moustakerski. A global macro investor for more than 50 years, Ray Dalio founded Bridgewater Associates out of his two-bedroom apartment in NYC and ran it for most of its 47 years, building it into the largest and most successful hedge fund in the world and the fifth most important private company in the U.S. according to Fortune Magazine. His industry-changing investment innovations (e.g., risk parity, alpha overlay, and All Weather) have changed the way global institutions approach investing.

### A Positive Approach to Prepare Families for Change and Growth\*

Oftentimes, families struggle with a sense of fear and lack the clarity needed to address complexities of navigating change and growth. In this session, participants will learn an easy-to-implement framework on how to develop a greater sense of positive influence within the family system. Through an experiential learning process, you will gain confidence and practical tools that are rooted in a positive, strengths-based approach. Speakers will challenge the perspective of “what do we want to prevent?” and replace it with, “how do we want to grow?”

### Shaping Family Values and Refining the Purpose for Wealth\*

During this workshop, family members will explore personal values and broader family values and what to do when the two are not aligned. Attendees will discuss what motivates an individual to contribute -in the family setting, in the work environment, or in broader society. Speakers will investigate the family's views on wealth purpose and identify the strategic choices a family will face.

### A Conversation with SEC Commissioner Hester M. Peirce

Join FOX for an insightful discussion with SEC Commissioner Hester Peirce. The Commissioner will share her thoughts on regulation impacting family offices, family businesses, and investments.

\*Sessions marked with asterisk (\*) offer CPE credit for every hour of programming



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## TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at [familyoffice.com/FF22](https://familyoffice.com/FF22) or contact us at [events@familyoffice.com](mailto:events@familyoffice.com)

	In-Person Member	Virtual Member
INDIVIDUAL ATTENDEES	Credit or US \$3000	\$0
MULTIPLE ATTENDEES FROM THE SAME FAMILY	Credit or US \$2,700	

\*Up to 7.5 CPE credits can be earned by attending this event as a Thought Leaders Council Member, Family Member, or Family Office Executive and up to 10.5 CPE credits as Rising Gen member. 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

### Loews Atlanta

1065 Peachtree Street NE, Atlanta GA, 30309

FOX has reserved a limited number of rooms at the Loews Atlanta at a discounted nightly rate.

Make your reservation [online](#) or call 1.877.872.0104 and reference the FOX Family Forum by October 3 to obtain this special conference rate (subject to room availability).



## FEATURED SESSIONS

### Harnessing Opportunity in the Exponential Age: Perspectives from Raoul Pal

Real Vision Group CEO, Raoul Pal, will examine how the last 100 years have brought the world to one of the most unique and unpredictable investment landscapes of the last 4 decades. The discussion will cover the global macro investing realm with an emphasis on what multi-generational families should consider given the current tension in the US between the fed, inflation, a looming recession, and the labor market. Raoul will also share his thoughts on the impact of the war in Europe, and the convergence and adoption of technology, including Blockchain and the tokenization of assets. This forward-thinking keynote on trends and strategies that families and family offices should employ is not to be missed.

### Effective Family Governance: Professionalizing the Board\*

From risk management to objective perspectives to succession planning, boards are a crucial component to help the family achieve longevity. Boards serve as a mechanism to clarify the mandates of the family and provide continuity and formal guidance to future generations. During this session, experts will share easy-to-implement governance tactics to sustain families for future generations.

### Strategic Philanthropy's Role in the Family Enterprise\*

Philanthropy is no longer just a box to check on the year-end planning list –over the last decade, strategic philanthropy has emerged as an invaluable tool for maximizing family engagement and creating targeted impact. This overlap of values and interests provides critical structure for families to come together to make targeted gifts. Panelists from notable philanthropic organizations will share how families can sustain their legacy through strategic philanthropy, including how it can bridge generations and perpetuate shared family values.

## FORUM SPONSORS

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