

**FOX
FAMILY
FORUM**

October 23-25, 2023
Chicago, IL
and Virtually

At the 2023 FOX Family Forum, family members, office executives, and their trusted advisors will discover ways to embrace the 'human side' of wealth and discover how other families are investing in their human capital and are achieving positive change with successful generational transitions.

From exploring pressing issues such as the importance of cultivating human capital, to a fireside chat with industry legend Jay Hughes to an "Industry Founders" panel with 5 of the most prominent and influential leaders and shapers of the family wealth space over the past 4 decades, this forum is a must for all members of UHNW families and the professionals who support them.

If you are joining the event in-person, there will be many dedicated opportunities to connect in person with other families, advisors, and FOX subject matter experts during the forum programming and at social events.

"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. 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. Central Time.

Monday, October 23 | 11:00 am - 5:30 pm

[Optional Programs – 8:30/9:00 am - 12:00 pm](#)

Followed by Welcome Reception at 5:30 pm. Reserved for family members, family office executives, and fox thought leaders council members.

Tuesday, October 24 | 8:00 am - 5:30 pm

Followed by Dinner at 7:00 pm

Wednesday, October 25 | 8:00 am - 1:00 pm

VIRTUAL FORUM SCHEDULE

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

Monday, October 23 | 1:15 pm - 5:30 pm

Tuesday, October 24 | 9:00 am - 5:30 pm

Wednesday, October 25 | 9:00 am - 1:00 pm

KEYNOTE SPEAKERS



James (Jay) E. Hughes Jr.
Author of *Family Wealth: Keeping it in the Family*, and of *Family - The Compact Among Generations*



Dr. Alexander D. Wissner-Gross
Founder and CEO, Reified



Robert C. Wolcott
Adjunct Professor, Booth & Kellogg, Chair & Founder, TWIN Global

FEATURED SESSIONS

Industry Founders Panel: The Evolution of Family Wealth*

For nearly 40 years, the pioneers of the family wealth profession have been working with family leaders and family office executives to help their families manage and grow their enterprises, strengthen their family systems and well-being, and deliver a positive impact on their communities and the world. For the first time ever, FOX will gather on the same stage the five most prominent and iconic founders of the family wealth field to reflect on the journey of the past four decades, share their vision of the future, and offer their wisdom and advice for the rising generation leaders who will steer their families and their enterprises into the decades to come.

[James \(Jay\) E. Hughes Jr.](#), Author of *Family Wealth: Keeping it in the Family*, and of *Family - The Compact Among Generations*

[Sara Hamilton](#), Founder and Board Chair, FOX

[Dennis T. Jaffe](#), Senior Research Fellow, BanyanGlobal Family Business Advisors

[Ellen Perry](#), Founder and Managing Partner, Wealthbridge Partners, LLC

[John A. Warnick, Esq.](#), Founder, Purposeful Planning Institute

Moderated by [Peter Moustakerski](#), CEO, FOX

Engaged Healthy, Wealthy & Wise: Lessons from Inheritors and their Significant Others*

When a young inheritor announces that they have met “the one,” the wheels of the wealth advising industry whirl into motion, with families and advisors discussing prenups, onboarding, and whether to include the new partner in family wealth discussions. But amid all of this, there is a young couple in love. How do we nurture this new union and foster relationships across the family instead of getting caught up in transactional work? What “best practices” should we reexamine in order to truly serve the well-being of all family members and allow space for couple-defined individuation? Covie will share with us the key insights she gleaned from two years of interviews with inheritors and their partners for her recently published book *Engaged Healthy, Wealthy & Wise* and how she has changed her approach to our work as a result.

To view the full forum agenda and speaker lineup, visit: familyoffice.com/learning-programs/forums/2023-fox-family-forum-person-agenda.

Sessions marked with asterisk () offer CPE credit for every hour of programing

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TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at familyoffice.com/FF23 or contact us at events@familyoffice.com.

	In-Person Member	Virtual Member	Virtual Non-Member
INDIVIDUAL ATTENDEES	Credit or US \$3,500	\$495	\$895
MULTIPLE ATTENDEES FROM THE SAME FAMILY	Credit or US \$3,150	NA	
RISING GEN AT FAMILY FORUM ONLY	Credit or US \$1,500		

Rising Gen programming, the Family Philanthropy Program, and the Direct Investing Dinner are included with Family Forum registration for eligible attendees.

***Up to 11.5 CPE credits can be earned by attending this event as a Thought Leaders Council Member, Family Member, or Family Office Executive and up to 14 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.

FEATURED SESSIONS

Reimagining the Future with AI: Fireside Chat with Dr. Alex Wissner-Gross*

The emergence of Artificial Intelligence (AI) is creating tremendous uncertainty – and amazing opportunities – for families, business owners, and advisors. Understanding the possibilities AI unlocks and integrating its transformative power into the family's systems, governance, and businesses has the potential to propel families and their family offices into a new era of speed, efficiency, and virtually infinite knowledge. Join us for this timely and relevant fireside chat with Dr. Alex Wissner-Gross to discuss the capabilities of this modern phenomenon, and the potential to automate tasks, enhance risk management, supercharge investment management, transform governance, and more.

PROXIMITY: How All Industries Will Transform - and How to Win*

Professor Wolcott will preview his new book, *PROXIMITY*, forthcoming from Columbia Business School Publishing March 2024. While everyone witnesses dramatic changes underway as a result of digitally-enabled technologies from Generative AI and data analytics to rooftop solar and additive manufacturing, few have noted one common force they all exert across industries. Digital technologies push the production and provision of value ever closer to the moment of actual demand in time and space. Understanding this trend clarifies where industries are heading and suggests priorities for innovation and investment.

OPTIONAL PROGRAMS

This year we are offering TWO (in-person only) additional learning opportunities: FAMILY PHILANTHROPY and RISING GEN. Sessions begin the morning of Monday, October 23.

Family Philanthropy | Starts at 8:30 am

This program is geared towards family office executives and family members with an interest in philanthropy.

Programming will start with a look at the current state of family philanthropy, examining the themes, trends, and conversations that are shaping the way we work.

Together with thought leaders and industry experts, we'll also explore how the family office and family philanthropy can work together to achieve greater impact. We'll learn from local philanthropic leaders about their work, and how they continue to learn, grow, and adapt their programmatic efforts to improve their communities.

Rising Gen | Starts at 9:00 am

Exclusively for our Rising Gen members!

Programming kicks off with Kristi Kuechler from The ImPact to discuss tactics to align your philanthropy with your values through the family office, and accessible ways to address social and environmental problems through your philanthropic choices.

Also featured, an expert panel sharing family case studies and tools to embrace the 'people' side of your involvement within the family governance structure.

We will also have an informal dinner open only to our Rising Gen participants on Sunday evening, October 22.

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

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DIRECT INVESTING NETWORKING DINNER

Ocean Prime

7:00 pm Sunday, October 22

Please join us for a dinner with private investors, focused on bringing together families with an active interest in direct investing. Meet other like-minded investors and engage in meaningful dialogue around deal flow and related topics.

The dinner is open to family members and family office executives.

VENUE AND ACCOMMODATIONS

Radisson Blu Aqua Hotel

221 North Columbus Drive, Chicago IL, 60601

FOX has reserved a limited number of rooms at the Radisson Blu Aqua Hotel at a discounted rate of \$289 per night plus applicable taxes.

Make your reservation [online](#) or call 1.800.333.3333 and reference the FOX Family Forum by September 29 to obtain this special conference rate (subject to room availability).

FORUM PARTNERS AND SPONSORS

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CLASSIC SPONSOR



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