

PREPARING FOR THE UNEXPECTED

FOX Rising Gen Forum | October 21-22
FOX Fall Enterprise Forum | October 22-24

JW Marriott | Chicago, IL



Agenda at a Glance

FOX RISING GEN FORUM OCTOBER 21-22

For FOX Rising Gen Family Members, Ages 20-45



Please join us for our second **FOX Rising Gen Forum** in Chicago on October 21 and 22. This community was created to help connect you with people, like yourself, looking for an opportunity to learn, share experiences, and develop skills as leaders within your families.

Sunday, October 21

- 11:00 am** Registration Opens
- 11:45 am** Rising Gen Luncheon
- 12:45 pm** Leading with Purpose: Bringing Meaning to Your Work
- 1:45 pm** Purpose in Action
- 3:00 pm** The Generation of Impact: Using Your Voice for Change
- 4:00 pm** Rising Gen Roundtables
- 6:00 pm** Rising Gen Dinner Reception

Monday, October 22

- 7:00 am** Rise and Shine Yoga
- 8:15 am** Networking Breakfast
- 9:05 am** The Benefits of Coaching for Leadership
- 11:00 am** Leadership Storytelling: Bringing It All Together
- 12:00 pm** Adjournment

Please join us for Optional Walking Tours of Chicago!

FOX will be hosting two walking tours of Chicago, you will go inside a handful of buildings in this two-hour, leisurely paced tour in the center of the city and learn about architecture and history in a highly dynamic, engaging, and context-based fashion.

- **Sunday, October 21, 9:00 - 11:00 am**
(Open to Family Members, Office Executives and FOX Thought Leaders Council Members)
- **Wednesday, October 24, 2:00 - 4:00 pm**
(Open to all attendees)



Please note that in order to increase the sustainability of our Forum programming, conference materials will be provided digitally for the Forum. Print binders will not be available. We encourage you to bring your tablet of choice to the program.

FOX FALL ENTERPRISE FORUM OCTOBER 22-24

For FOX Families and Family Office Executives



In periods of rapid change, the risks can sometimes seem overwhelming -- whether geopolitics, industry and market disruption, technological change, or cybersecurity concerns. However, one of the unanticipated benefits of change is the silver lining of new opportunities. The key to success is having the tools to identify innovative possibilities and to pursue them.

At this year's **FOX Fall Enterprise Forum**, you will hear from families who have taken a purposeful approach to building resilient enterprise families. You will learn from industry experts as they outline macro trends and frameworks for identifying opportunities in uncertainty. You can also join your peers in reviewing best practices and strategies that families have employed to become their own change agents in building adaptable and robust enterprise families.

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

Monday, October 22

Families, Family Office Executives, FOX Thought Leaders Council Members

- 9:30 am** Registration Opens
- 10:30 am** Introduction to the FOX Community and Speed Networking
- 12:30 pm** Luncheon and Seminar Introductions
- 2:00 pm** **Family Seminars**
 - SEMINAR 1**
The Culture Journey Learning Experience
 - SEMINAR 2**
An Entrepreneurial Pathway
 - SEMINAR 3**
Energizing the Enterprise: Designing an Opportunity and Risk Analysis Process
 - SEMINAR 4**
Investment Fundamentals
- 6:30 pm** Cocktail Reception and Dinner

Tuesday, October 23

All FOX Members

- 8:00 am** Breakfast and Registration
- 9:00 am** Growing a Resilient Family and Building a Sustainable Enterprise
- 9:40 am** Every Generation is a First Generation
- 11:00 am** Managing the Unexpected Using an Opportunity and Risk Framework
- 11:40 am** Global Risks and Your Risk Management Strategy
- 12:30 pm** Luncheon
- 1:30 pm** Peer Dialogues
- 3:15 pm** **Breakout Sessions**
 - BREAKOUT 1**
Is Data The New Alpha?
 - BREAKOUT 2**
Leadership: What Families Need Now
 - BREAKOUT 3**
Tax Planning Strategies for Real Estate Owning Families
 - BREAKOUT 4**
Lessons Learned from Seasoned Direct Investors
 - BREAKOUT 5**
FOX Compensation and Benefits Study
 - BREAKOUT 6**
The Essential Wellness Tool Kit
- 4:30 pm** Adjournment
- 7:00 pm** All Member Dinner at the Adler Planetarium

Wednesday, October 24

All FOX Members

- 8:00 am** Breakfast
- 9:10 am** Preparing for the Great Transformation in the Global Macro Environment
- 10:40 am** Families Investing in Disruption
- 11:30 am** Navigate Uncertainty by Building Vision
- 12:30 pm** Closing Remarks
- 12:45 pm** Grab 'N Go Lunch
- 2:00 pm** Optional Walking Tour

Presenters

FOX Rising Gen Forum Presenters

Heather Abramson

Regional Director, Membership, West, Family Office Exchange

Paulina Cromwell, CFA

Product Manager, Family Office Exchange

Greg McCann

Founder and Principal, McCann & Associates

Austin McDonald

President and COO, McDonald Development Company

Talli Sperry

Head of Family Office Segment, The Vanguard Group

Heather Winslow-Walker

Family Legacy Specialist, The Vanguard Group

Arthur Woods

Co-Founder and COO, Imperative

FOX Family Enterprise Forum Presenters

John Drzik

President, Global Risk and Digital, Marsh

Ken Cameron

Director, Grant Thornton, LLP

Dave Croci

Director of Leadership Development, Root, Inc.

Ann Dugan

Senior Managing Director of Advisory Services, Family Office Exchange

Brock Elmore

CEO and Co-Founder, Consilient

Sophie Felts

CEO and Founder, Sophie Felts Floral Design

David Friedman

Co-Founder, WealthQuotient

Alexandra Mayr-Gracik

President and CEO, Sabika, Inc.

Nate Hamilton, CFA

Advisory Board Member, Family Office Exchange

Sara Hamilton

Founder and CEO, Family Office Exchange

Stephen Hohenrieder

General Partner, Farmland LP

Kristi Kuechler

Managing Director, Investor Market, Family Office Exchange

Austin Kimson

Co-Founder and Senior Economist, Bain and Company

Tim Kuppler

Director, Human Synergistics, Inc. and Founder, CultureUniversity.com

Tina Milligan

Managing Director, BMO Wealth Management - CTC | myCFO

Miguel López de Silanes

Managing Director, Market Leader for Europe and Latin America, Family Office Exchange

Alexandre Monnier

President, Family Office Exchange

Patrick Moriarty

Partner, PwC

Wayne Osborne

Co-Founder and CEO, Way2B1

Chris Stillwell

Chairman, Stillwell Family Enterprise

Marianne Stillwell

Chairman, Stillwell Motor Group

Jeff Strese

Chief Talent and Learning Officer, Tolleson Wealth Management

David Toth

Managing Director, Family Office Exchange

Julie Wald

Founder and Chief Wellness Advisor, Namaste New York

Hardeep Walia

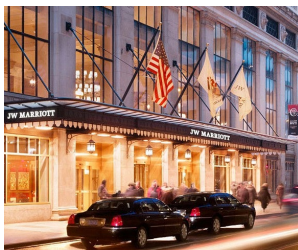
CEO, Motif Investing

Robert Wolcott, Ph.D.

Clinical Professor, Kellogg School of Management

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 \$329 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://book.passkey.com/go/FamilyOfficeExc>

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 Friday, September 21, 2018.

Forum Exhibitors



FOX RISING GEN FORUM

Finding Your Leadership Opportunity



For Family members in their 20s, 30s, and 40s, who are aspiring leaders within their family enterprise.

Please join us for our second **FOX Rising Gen Forum** in Chicago on October 21 and 22. This community was created to help connect you with people, like yourself, looking for an opportunity to learn, share experiences, and develop skills as leaders within your families.

At FOX, we have found that a commitment to learning is a key characteristic for leaders. Many successful leaders are continuous learners who are driven to innovate through their innate curiosity and sense of discovery.

Our sessions will focus on exploring new concepts and discovering what is important to us as future leaders. You will also have an opportunity to learn from and network with your peers while building lasting relationships.

Sunday, October 21

11:00 am Registration Opens

11:45 am Rising Gen Luncheon

12:30 pm Opening Remarks



Heather Abramson

Heather Abramson, Regional Director, Membership, West, Family Office Exchange

12:45 pm Leading with Purpose: Bringing Meaning to Your Work



Arthur Woods

Arthur Woods, Co-Founder and COO, Imperative

Purpose-driven leaders tap into what really motivates both themselves and others, and as a result they inspire their teams to achieve extraordinary results. Leading with purpose is particularly important to millennials and rising generation leaders. We'll talk about the purpose economy, and participants will have an opportunity to discover their own Purpose Profile™ using an online assessment.

1:45 pm Purpose in Action

Working in small groups, participants will identify their purpose priorities (work-related, philanthropic, family focused) and develop an action plan guided by their Purpose Profile™.

2:30 pm Networking Break

3:00 pm The Generation of Impact: Using Your Voice for Change



Paulina Cromwell, CFA

Paulina Cromwell, CFA, Product Manager, Family Office Exchange

The Rising Generation has been called “The Generation of Impact,” as we operate not only with a value-centric mindset but are insistent upon contributing to and seeing change. But how do we influence family leadership to think differently, and give us a seat at the table? In this interactive discussion, we will hear stories from peers who have been successful and explore how we can influence to make an impact.

4:00 pm Rising Gen Roundtables

Participants will choose a topic and join in facilitated discussions with peers. Potential topics may include the following: Dynamics with the Family Business, Managing Generational Differences, Sibling/Cousin Concerns, Spouse/In-Law Involvement.

6:00 pm Rising Gen Dinner Reception at Chicago Athletic Association Hotel

12 S. Michigan Avenue, Chicago, IL 60603

Enjoy the playful atmosphere of the Game Room while indulging in classic cocktails and street food favorites by Chicago’s 2018 Rising Star Chef. *This event is within walking distance from the JW Marriott.*

Monday, October 22

7:00 am Rise and Shine Yoga (Optional)

Start your day off right with a refreshing and energizing yoga session. Join a fellow Rising Gen member and yoga instructor for sun salutations and more. Wear comfortable clothes. Mats will be provided.

8:15 am Networking Breakfast

9:00 am Opening Remarks

9:05 am The Benefits of Coaching for Leadership



Austin McDonald

**Austin McDonald, President and COO, McDonald Development Company
Greg McCann, Founder and Principal, McCann & Associates**



Greg McCann

Engaging a coach can be an effective way to develop your leadership, engage your teams, and accelerate your career development. In this interactive session we will explore your understanding of coaching as a mindset, a skill set, and a resource for Rising Generation family members. Coaching can help you unlock your leadership potential, whether it is through peer coaching or working with a professional coach.

10:30 am Networking Break

11:00 am Leadership Storytelling: Bringing It All Together



Tali Sperry

**Tali Sperry, Head of Family Office Segment, The Vanguard Group
Heather Winslow-Walker, Family Legacy Specialist, The Vanguard Group**



Heather Winslow-Walker

During our time together, we will discover how to bring meaning to our work, identify our own purpose priorities, and understand how to use our voice for change. This session provides an opportunity to bring together these essential building blocks to tell a powerful story about the impact we want to have on our families and the world. Being able to clearly articulate what you care about will set you apart as a creative and authentic leader who can leverage stories that engage and persuade.

12:00 pm Adjournment

FOX Rising Gen Forum Participants are invited to join us for the FOX Fall Enterprise Forum Family Seminars and Dinner on Monday, October 21, included with FOX Rising Gen Forum Registration. Additionally, participants are encouraged to register for both Tuesday, or Tuesday and Wednesday, of the FOX Fall Enterprise Forum.

9:30 am Registration Opens

10:30 am Introduction to the FOX Community and Speed Networking (Optional)

12:30 pm Luncheon and Seminar Introductions

2:00 pm Family Seminars

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

SEMINAR 1 The Culture Journey Learning Experience



Tim Kuppler



Dave Croci

Tim Kuppler, Director, Human Synergistics, Inc. and Founder, CultureUniversity.com
Dave Croci, Director of Leadership Development, Root, Inc.

“Culture eats strategy for lunch” is a well-known adage that describes how vital an effective culture is to any organization’s success. A family’s culture, not unlike an organization’s, is fluid and ever-changing, shaped by shared values, beliefs, assumptions, and behaviors. This interactive learning experience will help family leaders and change agents understand the complexities of culture, and the connection to performance improvement in a rapidly changing environment. Combining peer learning with fundamentals about culture, climate, and change management, the Culture Journey experience uses the Root Learning Map®, reflections, and interactive scenarios to bring the culture journey to life.

SEMINAR 2 An Entrepreneurial Pathway



Ann Dugan



Brock Elmore



Sophie Felts



Alexandra
Mayr-Gracik

Ann Dugan, Senior Managing Director of Advisory Services, Family Office Exchange
Brock Elmore, CEO and Co-Founder, Consilient
Sophie Felts, CEO and Founder, Sophie Felts Floral Design
Alexandra Mayr-Gracik, President and CEO, Sabika, Inc.

Whether planning for the original family business or new businesses, the family foundation, family investing, or family real estate, being entrepreneurial and confident in your family enterprise approach is a key to success. This session is for families with passionate self-starters who have the desire to be fearless and resilient in their family enterprise work.

SEMINAR 3 Energizing the Enterprise: Designing an Opportunity and Risk Analysis Process



Sara Hamilton



Miguel López de Silanes

Sara Hamilton, Founder and CEO, Family Office Exchange
Miguel López de Silanes, Managing Director, Market Leader for Europe and Latin America, Family Office Exchange

Knowing more about future opportunities and unexpected risks can have a dramatic and positive impact on the health of the enterprise. Families will use a creative process to analyze alternatives and uncertainties that may challenge the family in their strategic planning. This workshop explains key concepts related to identifying driving forces and uncertainties, and introduces a systematic way to prioritize future opportunities and risks. An interactive, multi-generational case study will take participants through the experience of one family tackling these concepts across three generations.

SEMINAR 4 Investment Fundamentals



Kristi Kuechler



Paulina Cromwell, CFA

Kristi Kuechler, Managing Director, Investor Market, Family Office Exchange
Paulina Cromwell, CFA, Product Manager, Family Office Exchange

This interactive session will simulate real-world situations where investors of all ages navigate investing a new pool of capital. The speakers will help attendees define an investment philosophy by exploring: Return vs. Risk, Concentration vs. Diversification, Strategic vs. Tactical Allocation, and Passive vs. Active Management. Working in small groups, each team will define their investment philosophy around the above topics, state their general investment outlook, and report their portfolio allocation to the larger group. Combining learning methods to explain fundamental investment concepts, this session will help attendees understand the basic principles of investing in a fun, practical format.

6:30 pm Cocktail Reception and Dinner

For Families, Office Executives, and FOX Thought Leaders Council Members. JW Marriott Chicago

Tuesday, October 23

8:00 am Breakfast and Registration

9:00 am Growing a Resilient Family and Building a Sustainable Enterprise



Alexandre Monnier

Alexandre Monnier, President, Family Office Exchange

What makes a resilient family thrive and a sustainable family enterprise strong across the generations? Learn what is in store for attendees at this year’s FOX Fall Enterprise Forum, and get a deeper look at FOX’s approach to Enterprise Thinking and how members utilize this mindset so that every generation can be a first generation.

9:40 am Every Generation is a First Generation



Chris Stillwell

Chris Stillwell, Chairman, Stillwell Family Enterprise
Marianne Stillwell, Chairman, Stillwell Motor Group



Marianne Stillwell

Embracing an enterprise view, the Stillwell Family of Australia has guided their family enterprise through generational shifts spanning 67 years. With intention and thoughtful planning across the enterprise, the family has defined the purpose for their wealth, embraced educating the next generation, planned for the retirement of the current generation, outlined a clear succession plan, and developed a shared vision for the future. Hear from a leading international family about taking an enterprise approach and how it has laid the groundwork for a highly-functioning family.

10:30 am Networking Break



Please note that in order to increase the sustainability of our Forum programming, conference materials will be provided digitally for the Forum. Print binders will not be available. We encourage you to bring your tablet of choice to the program.

11:00 am Managing the Unexpected Using an Opportunity and Risk Framework



Sara Hamilton

Sara Hamilton, Founder and CEO, Family Office Exchange

Get a first look at the new FOX research on managing opportunities and risks in the family enterprise. This research focuses on a process for the family to address future uncertainties, recognizing both known and unknown risks a family may face in the 21st century. Families who can embrace change, seek opportunity, and manage uncertainty will create the most resilient enterprises of the future. The FOX model addresses the family view, the business view, the financial view, and the philanthropic view of the family enterprise, and provides practical tools for building thoughtful strategic plans for the future.

11:40 am Global Risks and Your Risk Management Strategy



John Drzik

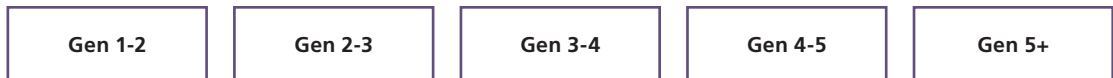
John Drzik, President, Global Risk and Digital, Marsh

Each year, the Global Risks Report, published by the World Economic Forum at Davos, in partnership with Marsh & McLennan Companies and Zurich Insurance Group, is a critical guide to explore some of the major challenges and risks of the world. Understand how decision-makers across the industry can find opportunity amid today's global challenges. From geopolitical turmoil, to environmental dangers, and cyber threats, we will discuss how businesses may find benefit in applying some of the same contingency planning principles to a wider array of risk planning.

12:30 pm Luncheon

1:30 pm Peer Dialogues for Family Members and Family Office Executives

FAMILY MEMBERS



FAMILY OFFICE EXECUTIVES



1:30 pm Peer Dialogues for Advisors and FOX Thought Leaders Council Members

David Friedman, Co-Founder, WealthQuotient

2:45 pm Networking Break

3:15 pm

Breakout Sessions

Please choose one of the following sessions.

BREAKOUT 1 Is Data the New Alpha?

Hardeep Walia

Hardeep Walia, CEO, Motif Investing

Alternative data is no longer an alternative. The digitization of our world has created an unprecedented data revolution that creates alpha opportunities for family offices in otherwise efficient markets. This cutting-edge talk will examine the latest in AI and data science and showcase where the future of alpha might come from. The asset manager of the future will need to evolve tools, processes, and personnel to exploit this alternative data advantage. The session will also demonstrate how data-driven products get developed and implemented in a portfolio.

BREAKOUT 2 Leadership: What Families Need Now

Jeff Strese

Jeff Strese, Chief Talent and Learning Officer, Tolleson Wealth Management

Family members from all generations are hungry for clarity on how to navigate the financial and emotional complexities of wealth. In order to do this well, families need leaders—all kinds, from all generations. Come to this session to learn how one Chief Learning Officer within a multi-family office helps families develop leadership skills that are pragmatic and cross-generational. Good leadership is easily identifiable when it is present within a family system, and often overlooked when a family lacks the skills to cultivate its own leaders. What do families need now? Leadership.

BREAKOUT 3 Tax Planning Strategies for Real Estate Owning Families

Tina Milligan

**Managing Director, BMO Wealth Management – CTC | myCFO
Patrick Moriarty, Partner, PwC**

Patrick Moriarty

Much has been written about the sweeping tax law changes as part of the 2017 Tax Cuts and Job Act. Ultra-wealthy taxpayers and business owners alike are faced with not only a myriad of changes, but also many planning opportunities. For real estate owners, investors, and developers, the impacts are significant. Experts will take participants through the tax law changes and explore opportunities for targeted trust strategies that real estate owning families might consider.

Breakout 4 Lessons Learned from Seasoned Direct Investors

Kristi Kuechler

Kristi Kuechler, Managing Director, Investor Market, Family Office Exchange

Direct Investing is a key investment focus for a growing number of families as they seek greater control of investments and wish to encourage entrepreneurship within the family. A panel of experienced direct investors will share real-life examples of how they source and vet opportunities. They will share lessons learned and best practices to help attendees develop their own family's private equity strategy.

BREAKOUT 5 FOX Compensation and Benefits Study

David Toth



Ken Cameron

**David Toth, Managing Director, Family Office Exchange
Ken Cameron, Director, Grant Thornton, LLP**

Offering a competitive compensation plan is essential to attracting and retaining the top talent that can ensure a family office's success. However, compensation is also consistently the biggest line item in every family office budget. This makes designing compensation plans that are competitive and effective especially imperative. Leaders from Family Office Exchange and Grant Thornton will share findings from this year's FOX Compensation and Benefits Survey, providing an update on trends in family office compensation along with the peer perspective necessary to benchmark, design, and plan for maximum return on investment.

BREAKOUT 6 The Essential Wellness Tool Kit - For You, Your Family, and Your Organization

Julie Wald

Julie Wald, Founder and Chief Wellness Advisor, Namaste New York

Research shows that effective self-care practices can lead to success at work and at home. Join us to discuss the four pillars of well-being and how they inform the way we care for ourselves, our families, and our organizations. Develop a practical self-care tool kit, including mindfulness, nutrition, and movement to increase your productivity in the office, impact your effectiveness as a family member, and engender greater fulfillment and longevity.

4:30 pm Adjournment

7:00 pm All Member Dinner at the Adler Planetarium

Join us for a dinner with your peers at the Adler Planetarium, beginning with cocktails under the soaring domed ceiling in the Grainger Sky Theatre, followed by dinner in the Daniel F. and Ada L. Rice Solarium with breathtaking views of the Chicago Skyline. *Shuttle service will be provided.*





Please join us for Optional Walking Tours of Chicago!

FOX will be hosting two walking tours of Chicago, you will go inside a handful of buildings in this two-hour, leisurely paced tour in the center of the city and learn about architecture and history in a highly dynamic, engaging, and context-based fashion. Tours are available on 10/21 and 10/24, please see page 2.

8:00 am Breakfast

9:00 am Opening Remarks

9:10 am Preparing for the Great Transformation in the Global Macro Environment



Austin Kimson

Austin Kimson, Co-Founder and Senior Economist, Bain and Company

Family Enterprises will be transformed by a shifting macro environment. Austin Kimson from Bain and Company believes geopolitics, demographics, and technology are colliding to unleash a massive new boom-to-bust cycle in the coming decade. The Bain Macro Trends Group research predicts a new set of winners and losers. Trends of regionalism and populism will be profound as risk premiums rise, global institutions lose trust, and tech innovations change the way things work. This confluence of emerging trends must be understood in order to position the complex moving parts of the family enterprise to remain at the leading edge. Don't miss this powerful research-based understanding of our new economic reality.

10:10 am Networking Break

10:40 am Families Investing in Disruption



Nate Hamilton, CFA



Wayne Osborne



Stephen Hohenrieder

**Nate Hamilton, CFA, Advisory Board Member, Family Office Exchange
Wayne Osborne, Founder and CEO, Way2B1
Stephen Hohenrieder, General Partner, Farmland LP**

There is often a silver-lining in the dark clouds of uncertainty and change. Families who are able to effectively navigate turmoil in a market disruption to find opportunity will thrive. We will hear from several families who are thoughtfully embracing risk, investing in industry disruption, and finding significant growth.

11:30 am Navigate Uncertainty by Building Vision



Robert Wolcott

Robert Wolcott, Ph.D., Clinical Professor of Innovation and Entrepreneurship, Kellogg School of Management

If you don't create your future with purpose and intention, you will become the past. Professor Wolcott will share his insight on the discipline required to build your vision for your future, whether it be for your family or your family enterprise. Navigating through uncertainty by envisioning the contours of threats and opportunities is essential to prepare for the unexpected—and to create the future you desire.

12:30 pm Closing Remarks

12:45 pm Grab 'N Go Lunch



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 **16 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 understand the tools, best practices, and strategies successful enterprise families utilize to manage periods of rapid change as it relates to topics, such as: geopolitics, industry and market disruption, technological change, and cybersecurity concerns.

FOX Rising Gen	FOX Fall Enterprise Forum	
Oct 21	Oct 22	Oct 23 & 24
5 CPE Credits	3.5 CPE Credits	7.5 CPE Credits



Register online at
www.familyoffice.com/FallEnterprise2018



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 _____

For event registrations, refunds of payment or forum allotments 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.

Please select one: I am a

- Wealth Owner FOX Thought Leaders Council Member Family Member
 Trustee Board/Council Member Beneficiary Family Office Executive

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 Enterprise Forum? (formerly the FOX Fall Forum) Yes No

Will you stay at the JW Marriott during the Forum?

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

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

Do you have any special dietary or accessibility needs?

Would you like to attend an optional walking tour of Chicago?

- Yes: Sunday, October 21, 9:00 am-11:00 am
(Open to Family Members, Office Executives and FOX Thought Leaders Council Members)
 Yes: Wednesday, October 24, 2:00 pm - 4:00 pm (Open to All Members)
 No

FOX RISING GEN FORUM SELECTIONS

Please select your age range:

- 20-29 30-39 40-45

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

- Gen 2 Gen 3 Gen 4 Gen 5 Unknown

I play an active role in the family business:

- Yes No Preparing to

My biggest challenge as a member of the rising generation is

SUNDAY, OCTOBER 21

Will you attend the luncheon at 11:45 am? Yes No

Will you attend the Rising Gen Dinner Reception at 6:00 pm? Yes No

I am most interested in the following roundtable topics:

- Dynamics with the Family Business Managing Generational Differences
 Sibling/Cousin Concerns Spouse/In-Law Involvement
 Other _____

MONDAY, OCTOBER 22

Will you attend Rise and Shine Yoga at 7 am? Yes No

Will you attend the Networking Breakfast at 8:15 am? Yes No

Will you attend the Monday lunch at 12:30 pm? Yes No

Do you plan to join us for Monday afternoon Family Seminars and Dinner?

- Yes No (If yes - Please be sure to make the appropriate selections in the Fall Enterprise Forum column)

REGISTRATION OPTIONS AND FEES

Wealth Owners, Family Members, and Family Office Executives

	FOX Member	Non-Member	Use Event Credit
FOX Fall Enterprise Forum Only (Oct. 22-24) Additional discounts are available for multiple attendees, please contact your relationship manager for more information.	\$2,350	\$2,950	<input type="checkbox"/>
FOX Rising Gen Forum Only (Oct. 21-22) Includes FOX Fall Enterprise Forum Family Seminars and Dinner on 10/22	\$1,250	\$1,500	<input type="checkbox"/>
FOX Rising Gen Forum (Oct. 21-23) PLUS FOX Fall Enterprise Forum - Sun. 10/21 through Tues. 10/23	\$1,850	\$2,100	<input type="checkbox"/>
FOX Rising Gen Forum (Oct. 21-24) PLUS The full FOX Fall Enterprise Forum - Sun. 10/21 through Wed. 10/24	\$2,350	\$2,950	<input type="checkbox"/>

FOX Thought Leaders Council Members

- FOX Fall Enterprise Forum Only (Oct. 22-24) Use Event Credit Included in FOX Membership

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
- To pay by credit card please call the Events team directly at 312.327.1221 and provide credit card details.

ALL REGISTRATIONS SUBJECT TO APPROVAL BY FOX.

FOX FALL ENTERPRISE FORUM SELECTIONS

MONDAY, OCTOBER 22

Will you attend the following?

- Optional Speed Networking at 10:30 am Luncheon at 12:30 pm
 Cocktail Reception and Dinner at 6:30 pm

Please select one of the family seminars:

- The Culture Journey Learning Experience An Entrepreneurial Pathway
 Energizing the Enterprise Investment Fundamentals

Is culture important for the success of families through the generations?

- Yes No

What are your top culture challenges? (select all that apply)

- Aligning the family office culture with the family culture
 Overcoming drama, silos, or ineffective aspects of the current culture
 Gaining initial support regarding the need for change
 Defining clear improvement plans or strategies
 Engaging family members, office members, and building ownership
 Other _____

TUESDAY, OCTOBER 23

Will you attend the following?

- Breakfast at 8:00 am Luncheon at 12:30 pm
 All Member Dinner at 7:00 pm

Please select One Peer Dialogue:

Dialogues for Family Members and Family Office Executives

- Gen 1-2 Gen 2-3 Gen 3-4 Gen 4-5 Gen 5+

Dialogues for Family Office Executives

- 1-6 employees 7-14 employees 15-19 employees 20+ employees

Will you attend the Peer Dialogue for Advisors and FOX Thought Leaders Council Members?

- Yes No

Please select One Breakout Session:

- Is Data the New Alpha?
 Leadership: What Families Need Now
 Tax Planning Strategies for Real Estate Owning Families
 Lessons Learned from Seasoned Direct Investors
 FOX Compensation and Benefits Study
 The Essential Wellness Tool Kit

WEDNESDAY, OCTOBER 24

Will you attend the following?

- Breakfast at 8:00 am