

FOX RISING GEN FORUM™

OCTOBER 27-28 | JW MARRIOTT | CHICAGO, IL



The **2019 FOX Rising Gen Forum** is an opportunity for family members in their 20s, 30s and 40s to meet and build relationships with other members of the Rising Gen community who are in similar situations. The Forum provides a place where you can have the authentic conversations you might not be able to with friends or business colleagues.

Participants learn about family dynamics as a rising generation member and best practices in navigating the unique challenges facing families with shared ownership. The Forum provides a great place to make genuine connections, learn, and bring new ideas back to the family and family office.

*"...a wonderful opportunity to meet fellow FOX Rising Gen members, **connect over common issues and life situations, and build lasting friendships.**"*

-2019 Spring Forum Attendee

The FOX Rising Gen Forum will offer participants an opportunity to learn from other families and:

- Hear how a 5th generation family member from a storied family works to bring about social change by blending family legacy and family values to shape a new approach to managing capital and philanthropy.
- Explore the good, the bad, and the ugly around formal succession and transfer of power and control within families of wealth with a Gen 6 family who will discuss their recent generational transition.
- Understand from a father-daughter team about what it means to be an engaged beneficiary and how they make the trustee-beneficiary relationship work.
- Bring your issues, concerns and burning questions to a roundtable discussion with FOX subject matter experts on topics such as governance, leadership roles, family dynamics, and effective communications.

HOSTS AND PRESENTERS



Heather Abramson
Regional Director Membership, West,
Family Office Exchange



Mindy Kalinowski Earley
Chief Learning Officer, Family Office Exchange



Nate Imfeld
Attorney, Foley & Lardner, LLP



Robert Hammett
Vice President, ChiFam LLC



Stephanie Hammett
ChiFam LLC, NextGen



Torri Hawley
Windway Capital, NextGen



Justin Rockefeller
Global Director of Family Offices
and Foundations, Addepar



Sarah Kerr Severson
Partner, Schiff Hardin, LLC

FOX RISING GEN ADVISORY BOARD



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Vice President and Family Member, Investment
Resources Corporation



Mary Grace Hinkle
Director, Hinkle Holding Company and MBA
Candidate at UNC Kenan-Flagler Business School

JOIN US!

FOX 30th Anniversary Forum
Celebrating and Connecting Families of Impact
Oct 28-30, 2019

Please see the agenda at a glance on pages 5-6

For a detailed agenda and more information,
please visit: www.familyoffice.com/30TH

VENUE AND HOTEL 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 \$299 per night plus applicable taxes. 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/FamilyOfficeExchangeForum>

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 Wednesday, October 2, 2019.



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 **3 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 best practices for generational transitions, trustee-beneficiary relationships, governance roles, building investment strategies, and family communications.

1:00 pm Registration Opens

2:00 pm **Opening Remarks**

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

2:15 pm **Discovery Session**

A highly valued benefit of participating in a FOX Rising Gen Forum is getting to know your peers in a safe space to explore the challenges and opportunities facing young people of wealth. We will “break the ice” and kick-off with fun, interactive activities designed to jump-start your networking.

3:00 pm **Crafting Impact**

Justin Rockefeller, Global Director of
Family Offices and Foundations,
Addepar

Hear how a 5th generation family member from a storied family has learned to blend family legacy and family values to shape a new approach to managing capital and philanthropy, striving for a greater impact in the world. Justin Rockefeller will share how he brings his expertise in technology, impact investing, and philanthropy to inform not only his role with Addepar, a technology firm, but also to the work of The ImPact, a social enterprise that aims to affect significant social change, as well as through the work of his family’s foundation.

4:00 pm **Rising Gen Peer Dialogues**

Participants will choose a topic and join in facilitated discussions with peers. Topics may include life stages (e.g. The Single Life, Engaging the Spouse), working in the family enterprise, family dynamics and communications, preparing for succession, and governance roles.

5:30 pm **Sunday Agenda Concludes**

6:30 pm **Cocktail Reception & Dinner**

Join us at LUXBAR, in Chicago's historic Gold Coast district, for a casual dinner with your fellow FOX Rising Gen Forum attendees.

LUXBAR

18 E Bellevue Pl, Chicago, IL 60611

www.luxbar.com



“The FOX Rising Gen Forum is a great opportunity to learn about what other family offices are doing and learn what issues or decisions may lie ahead that we don’t see coming yet.”

“A place where you can have the tough and authentic conversations that are difficult with your normal friends or even business connections.”

-2019 Spring Forum Attendees

8:00 am Registration and
Networking Breakfast

9:00 am **Opening Remarks**
Heather Abramson,
Regional Director Membership, West,
Family Office Exchange

9:10 am **Generation Succession**
Nate Imfeld, Attorney,
Foley & Lardner, LLP
Torri Hawley, Windway Capital,
NextGen
Explore the good, the bad, and the ugly
around succession and generational
transitions of power and control within
families of wealth. Hear from one Gen
6 family on their recent generational
succession, what prompted the transition,
and how they navigated the practical and
emotional challenges.



10:00 am **Ask the Expert: Roundtable
Discussions with FOX Subject
Matter Experts**
Bring your issues, concerns, and burning
questions to a roundtable discussion with
FOX subject matter experts on topics such
as family dynamics and communications,
building investment strategies and
direct investing, unique challenges and
opportunities facing international families,
and governance roles and opportunities for
rising generation family members.

11:00 am **Networking Break**

11:15 am **The Engaged Beneficiary: What
You Need to Know**

Robert Hammett, Vice President,
ChiFam LLC

Stephanie Hammett, ChiFam LLC
NextGen

Sarah Kerr Severson, Partner,
Schiff Hardin, LLC

What does it mean to be an engaged
and responsible beneficiary? We will
explore the roles and responsibilities of a
trustee, and learn from a father-daughter
team about how they make the trustee-
beneficiary relationship work. We will
understand the roles each party plays and
how to effectively approach trust-related
communications.

12:15 pm **Closing Remarks and
Staying Connected**

Join us at the FOX 30th Anniversary Forum! Celebrating and Connecting Families of Impact | Oct 28-30

FOX Rising Gen Forum Participants are invited to join us for the FOX 30th Anniversary Forum Family Seminars and Dinner on Monday, October 28, included with FOX Rising Gen Forum Registration. Additionally, participants are encouraged to register for the full FOX 30th Anniversary Forum which runs through Wednesday, October 30. Please see pages 5-6 for an overview.

For a detailed agenda and more information, please visit: www.familyoffice.com/30TH

12:30 pm Luncheon and Seminar Introductions

2:00 pm

Family Seminars - All Seminars Designed and Moderated by FOX

Please choose one of the following seminars. Open to Family Members, Single Family Office Executives, and FOX Thought Leaders Council Members.

SEMINAR 1 Building an Innovation Competence in Your Enterprise Family

Miguel López de Silanes Gómez, Managing Director, Market Leader for Europe and Latin America, Family Office Exchange; Larry Keeley, President/Co-Founder & Managing Director, Doblin a Deloitte Business

Co-founder of innovation firm Doblin and a renowned innovation scientist, Larry Keeley has worked for decades to create the most effective techniques in the innovation field. His methods are used by leading firms the world over—including many of the largest family-owned and family-controlled enterprises. Larry will bring specific tools you can use to shape and sharpen your innovation thinking and plans. This session provides an opportunity for enterprise family attendees to assess your approach to innovation within your own businesses, and identify the most important areas where you can improve your innovation successes.

SEMINAR 2 Engaging the Rising Generation

Mindy Kalinowski Earley, Chief Learning Officer, Family Office Exchange; Michael Nelson, Chief Administrative Officer, AMWAY; Carl Robinson, Ph.D., Founding Partner, Vantage Leadership

Amway Corporation leadership will share how they deepened engagement with next generation, including designing an Ambassador Program, establishing pathways to employment in the business, and creating an idea lab. Participants will engage in activities to develop other avenues for engagement.

SEMINAR 3 Direct Investing Best Practices and Case Studies

Cary Nourie, Director, Direct Investing Network, Family Office Exchange; Nate Hamilton, Advisory Board Member, Family Office Exchange; David M. Bauer, Chief Investment Officer, Lubar & Co.; Troy McWhinney, Chief Investment Officer & Co-Founder, McWhinney Holding Company, LLP; Karin Rosen, Chief Executive Officer, Rosen's Diversified, Inc. Single Family Office

Understand the good, the bad, and the promise of direct investing. Members of the FOX DIN Network will share their insights and experiences with direct investing and provide valuable lessons and best practices they have learned. This session will involve roundtable discussions of current deal activity.

SEMINAR 4 Family Office Trends and Best Practices

Glen W. Johnson, Chief Operating Officer, Family Office Exchange; Patience Marmer, Senior Relationship Manager, Family Office Exchange; Christine B. Franco, Chief Executive Officer, Chinquapin Trust Company; Lauren Heisler, President, Elser Enterprises, Inc.

This session will highlight new trends and shifts in office complexity and operations based on the recent FOX Family Office Benchmarking Survey. We will facilitate discussion among participants to help consider how to evolve services, talent, and technology.

SEMINAR 5 Being an Effective Trustee and a Responsible Beneficiary

Ruth Easterling, Managing Director, Member Services, Family Office Exchange; Katherine Dunlevie, Managing Director, Synovus Family Asset Management; Tina Milligan, Managing Director, BMO Family Office; Amy Griman, Chief Trust Officer, BMO Wealth Management; Gilbert Miller, Chair, Bradley-Turner Foundation; Gen 5, Bradley-Turner Family

A trustee of family trusts must understand the legal duties and deliver them with a keen appreciation of family dynamics. We will discuss the range of trustee and beneficiary responsibilities as well as practical tips for making the trustee-beneficiary relationship work effectively. Members will share their experiences as trustees.

6:00 pm

Cocktail Reception and Dinner

For Families, Single Family Office Executives, and FOX Thought Leaders Council Members.

Join us at the Chicago Cultural Center's Preston Bradley Hall for dinner under the spectacular Tiffany Dome. *Shuttle service will be provided.*

Following the Rising Gen Forum, join us for the 30th Anniversary Forum. (registration details on page 7.) For a detailed agenda and more information, please visit: www.familyoffice.com/30TH



This year's Forum marks a significant milestone as we celebrate a generation of working closely with families, family offices, and trusted advisors. Participants will gain insight directly from successful families of impact as they share their challenges and successes in bridging multiple generations. Our featured families will share stories about building resilience across generations, planning for leadership succession, and engaging family members in the process.

Attending the Forum together as a family will provide great opportunities for shared perspective and deeper discussions among family members. We will offer a wide range of interactive sessions and the opportunity to expand your network in our unique peer community. Additionally, join us for a celebratory 30th Anniversary all-member dinner at Chicago's beautiful Theater on the Lake.

TUESDAY, OCTOBER 29

All FOX Members

- 8:00 am** Breakfast and Registration
- 9:00 am** Looking Forward to New Challenges
- 9:45 am** Gen 1-2: Designing a Shared Vision for the Hojel Family
- 11:15 am** Gen 2-3: Leadership Transition: From Preparation to Empowerment with the Gallardo Family
- 12:30 pm** Luncheon
- 1:45 pm** Gen 4-6: Family Engagement Program Crafted by the Todd Family
- 3:15 pm** Peer Dialogues
- 4:45 pm** Adjournment
- 6:00 pm** Transportation to All Member Dinner
- 6:30 pm** All Member Dinner at Theater on the Lake

WEDNESDAY, OCTOBER 30

All FOX Members

- 8:00 am** Breakfast and Registration
- 9:00 am** Opening Remarks
- 9:15 am** Looking Forward: The Future of Wealth Management
- 10:45 am** The Future of the Family Office
- 11:45 am** Rising Gen Perspectives: What We Want Our Parents to Know
- 12:45 pm** Closing Remarks
- 1:00 pm** Grab 'n Go Lunch

FOX Rising Gen Forum™ Registration

October 27-28, 2019 | JW Marriott | Chicago, IL



Register online at www.familyoffice.com/RGFF



Scan and email to events@familyoffice.com



Fax this form to our Events Team at 312.327.1212

ATTENDEE INFORMATION

Select information will be used for your forum badge, including city and state.

Name (First/Last)

Nickname (For event nametag if different than above.)

Title

Family/Firm Name

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

E-mail

REGISTRATION OPTIONS AND FEES

Wealth Owners, Family Members, and Family Office Executives

	FOX Member	Non-Member	Use Event Credit
FOX Rising Gen Forum Only (Oct. 27-28) Includes FOX 30 th Anniversary Forum Family Seminars and Dinner on 10/28	\$1,900	\$2,400	<input type="checkbox"/>
FOX Rising Gen Forum Plus (Oct. 27-30) Includes FOX 30 th Anniversary Forum - Sun. 10/27 through Wed. 10/30	\$2,900	\$3,600	<input type="checkbox"/>

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.

Please select all that apply: I am a

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

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 this program?

- 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?

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.

FOX RISING GEN FORUM SELECTIONS

Please select your age range: 20-29 30-39 40+

I play an active role in the family office/business:

- Yes No Preparing to

What is your role in the family office/business? (current or potential role)

My biggest challenge as a member of the rising generation is:

I'd like to talk to a FOX Subject Matter Expert about:

SUNDAY, OCTOBER 27

Will you attend the Rising Gen Dinner Reception at 6:30 pm?

- Yes No

MONDAY, OCTOBER 28

Will you attend the Networking Breakfast at 8:00 am? 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 30th Anniversary Forum section below)

FOX 30TH ANNIVERSARY FORUM SELECTIONS

MONDAY, OCTOBER 28

Will you attend the following?

- Luncheon at 12:30 pm?
 Cocktail Reception and Dinner at 6:00 pm

Please select one of the family seminars:

- Building an Innovation Competence in Your Enterprise Family
 Engaging the Rising Generation
 Direct Investing Best Practices and Case Studies
 Family Office Trends and Best Practices
 Being an Effective Trustee and Responsible Beneficiary

TUESDAY, OCTOBER 29

Will you attend the following?

- Breakfast at 8:00 am Luncheon at 12:30 pm
 All Member Dinner at 6:30 pm

Please select one Peer Dialogue:

Family Member Dialogues

- Gen 1 & 2 Gen 3 & 4 Gen 5+
 International Families Gen 1-3 International Families Gen 4-6

WEDNESDAY, OCTOBER 30

Will you attend the Breakfast at 8:00 am?

- Yes, I will attend
 No, I will not attend

Would you like a Grab 'n Go Lunch at 1:00 pm?

- Yes, I will have a Grab 'n Go Lunch
 No, I will not have a Grab 'n Go Lunch

ALL REGISTRATIONS SUBJECT TO APPROVAL BY FOX.



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