

FOX RISING GEN LEADERSHIP PROGRAM

FEBRUARY 28-29, 2020 | PHOENIX, AZ



Expand your knowledge of the essential leadership building blocks to help prepare for your role in life and in the family:



**PERSONAL
IDENTITY AND
GROWTH**



**FAMILY DYNAMICS
AND FAMILY
ENGAGEMENT**



**SHARED
OWNERSHIP AND
LEADERSHIP**



**GOVERNANCE
AND BOARD
TRAINING**

About the FOX Rising Gen Leadership Program

February 28-29, 2020 | Phoenix, AZ



Family Office Exchange (FOX) is pleased to offer the Rising Gen Leadership Program for the preparation of future family leaders. The learning series is focused on educating future family leaders so they are armed with the skills needed to thrive in life, business, and wealth stewardship. Participants will attend educational sessions and engage in peer networking and experiential activities.

This education program is a multi-disciplinary approach that will cover four diverse subject areas needed to be an equipped, informed, and contributing leader to the family enterprise. These courses are the essential building blocks for family leadership preparation, and part of an overall core curriculum that will be presented at future FOX Rising Gen Leadership Programs.

Participants in the program will obtain knowledge as they pursue their careers and increased credibility within the family.

Additionally, interacting with a peer community will allow rising generation family members to have honest and informative conversations addressing their unique questions related to family, business, and leadership.

For 30 years FOX has been sharing experiences, education, and guidance with families, family office executives, and advisors. FOX is delighted to present this important program to empower future family leaders and equip them with a leadership toolkit for the future.

WHO SHOULD ATTEND

Registration for the FOX Rising Gen Leadership Program is open to family members in their 20's, 30's and 40's. Limited spaces are available as this program is intended to provide an intimate experience that fosters connection among peers.

AGENDA AT A GLANCE

DAY 1 AGENDA: Friday, February 28		DAY 2 AGENDA: Saturday, February 29	
8:30 am	Registration and Breakfast	8:30 am	Breakfast
9:00 am	Introduction and Networking Activity MODULE A: Personal Skills Inventory and Assessments	9:00 am	Reflections MODULE C: Shared Ownership and Governance
12:30 pm	Lunch	11:15 am	Lunch
1:15 pm	MODULE B: Effective Communication in a Family Setting MODULE C: Family Leadership Skills	12:00 pm	Practical Application MODULE D: What Goes on in the Boardroom?
5:00 pm	Meeting Adjournment	4:15 pm	Final Reflection
6:00 pm	Cocktail Reception & Dinner	4:30 pm	Meeting Adjournment



MODULE A



PERSONAL IDENTITY AND GROWTH

PERSONAL SKILLS INVENTORY AND ASSESSMENTS

First, know yourself. Before leading others, you must be certain of who you are and what you bring to the table. This course offers the opportunity to harness the power of self-awareness by developing a keen understanding of your own skills, abilities, and interests. Complete the Strong Interest Inventory assessment that will strengthen your knowledge of self, while simultaneously allowing you to fine-tune your learning and career goals. Inform your work environment and life goals with a sense of purpose. Take this opportunity to strengthen your voice and confidently engage in the activities of your family.

MODULE B



FAMILY DYNAMICS AND FAMILY ENGAGEMENT

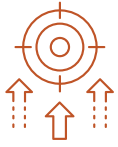
EFFECTIVE COMMUNICATION IN A FAMILY SETTING

Having impact in the family as a member of the rising generation is often fraught with challenges. Trying to navigate the authority of the leadership generation while also working to bring your own voice, and those of your generation, to the table can be difficult. The art of effective communication is key to being an impactful leader. This means practicing active listening and being able to “read the room.” Additionally, crafting a clear and concise message enables you to be understood, and heard, and these skills, combined with strong emotional intelligence, can help you have the influence you desire within your family.





MODULE C



SHARED OWNERSHIP AND LEADERSHIP

FAMILY LEADERSHIP SKILLS

The 21st Century requires different leadership skills to manage the challenges in the family. The future of the family is more dependent than ever on being adaptable to change and dealing with uncertainty. This session will identify the leadership skills you need to analyze and manage change as you take your place in the decision-making system. We will identify how the change occurs in families and how you can influence that change process. We will show you how to identify the change agents in the family, and how to assess readiness for change in the family system.

SHARED OWNERSHIP AND GOVERNANCE

This session will show you how shared ownership impacts your family, and the different generational views of ownership. Together, we will explore ownership versus management roles, and the leadership skills required for each. We will introduce the concept of family governance, how it evolves across generations as the family grows, and as complexity increases for owners. We will discuss what new decisions will need to be addressed in a 21st Century world, and how families must reshape their governance structures to deal with future ambiguity and uncertainty.

MODULE D



GOVERNANCE AND BOARD TRAINING

WHAT GOES ON IN THE BOARDROOM?

Members of successful families are recognizing the role governing boards play in the preservation of their family enterprise. Having well-organized governance systems to promote family unity is pivotal. No matter your family's size or current structure, this course provides a foundational understanding of the core elements of family governance. This includes ways to establish clear expectations for board members, processes for group decision-making in families and clear understanding of required behavior and protocol. We will explore behaviors that indicate board readiness so that you walk into your first board meeting equipped for success and impact.



MINDY KALINOWSKI EARLEY, CMP, CFBA | Chief Learning Officer, FOX Family Learning Center™

Mindy Earley is Chief Learning Officer for Family Office Exchange. In her role, she works to foster integrated learning programs for enterprise families and is responsible for developing the family learning community. She provides support to the Family Learning and Experience Council and FOX Family Learning Network. Mindy is inspired by helping people learn, grow and discover the way that they will make personal and productive contributions, using their strengths and talents.

Mindy has held various roles in small and large family offices and has been responsible for creating and stewarding professional learning networks in support of human and intellectual capital. She has designed learning experiences that increase the knowledge base and enhance the life path of individuals while providing personalized support and coaching to help them meet their goals.



SARA HAMILTON | Founder and CEO, Family Office Exchange

Sara Hamilton is the Founder and CEO of Family Office Exchange (FOX). Sara is a recognized visionary and credited with professionalizing the family office industry. Sara founded FOX in 1989 as a peer network for family office executives. Within 10 years, FOX could see that families needed help with their enterprise vision, managing financial transitions, and educating family members on responsible ownership.

Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting family enterprises, family office executives, and wealth advisory firms in more than 27 countries. FOX has built a unique team of professionals serving multi-generational families, led by 20 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, San Francisco, and Madrid.



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 12.5 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 this program, participants will gain an understanding of how to assess their own learning style, learn leadership skills for earning authority, receive an overview of personal financial literacy, and will learn tools and skills for board training and stewardship.

FOX Rising Gen Leadership Program Registration

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REGISTRATION QUESTIONS

Registration for the FOX Rising Gen is open to family members in their 20s, 30s and 40s, who are aspiring leaders within their family's enterprise. All registrations subject to approval by FOX.

Please select your age range:

- 20-29 30-39 40+

Please select your generation in the family:

- Gen 1 Gen 2 Gen 3 Gen 4
 Gen 5 Gen 6 Unknown

What is your role in the family today?
(current or potential role)

What is your desired role in the future?

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

Where is your Family Office Located? (city/state)

Where do you currently live? (city/state)

Will you attend the following meals on February 28?

- Breakfast Lunch
 Cocktail Reception & Dinner

Will you attend the following meals on February 29?

- Breakfast Lunch

LOCATION AND ACCOMMODATIONS

JW Marriott Phoenix Desert Ridge Resort & Spa

5350 East Marriott Drive
Phoenix, Arizona 85054

<https://www.marriott.com/hotels/travel/phx-drjw-marriott-phoenix-desert-ridge-resort-and-spa/>

FOX has reserved a limited number of rooms at the JW Marriott Phoenix Desert Ridge Resort & Spa at a rate of \$355 per night plus a \$35 resort fee and applicable taxes. To obtain this discounted rate, please contact the JW Marriott directly at 1-800-835-6206 and mention the "Family Office Exchange (FOX) Rising Gen Workshop." You may also book rooms online at <https://book.passkey.com/go/FOXRising2020>

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, January 31.

THREE WAYS TO REGISTER

1. Scan and email to: events@familyoffice.com
2. Register online at: www.familyoffice.com/RGLP20
3. Fax this form to: 1.312.327.1212

Space is limited. All attendees must register online or submit this registration form prior to the event to secure a seat.

ATTENDEE INFORMATION: Select information will be used for your badge, including city and state.

Name (First/Last)

Name of Firm/Family Office

Title/Position

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

E-mail

Do you have any dietary or special needs?

QUESTIONS?

Contact us at events@familyoffice.com or call 312.327.1221

This program involves pre-work which must be completed in advance. Participants should expect to receive an email with instructions and plan to complete the materials well before arriving.

REGISTRATION FEES

FOX Member

First Paid Attendee

\$3,900

Additional Paid Attendees

\$3,500

FOX Non-Member*

First Paid Attendee

\$4,875

Additional Paid Attendees

\$4,375

A family group discount is available, please contact us for details.

If you are not a member of Family Office Exchange, please contact info@familyoffice.com for membership information.

PAYMENT METHOD

- Payment by check is enclosed. (Check payable in U.S. dollars to Family Office Exchange)

Please mail check and this registration form to:

Family Office Exchange

ATTN: Events

100 South Wacker Drive, Suite 800, Chicago, IL 60606

- To pay by credit card please call the Events Team directly at 1.312.327.1221 and provide credit card details or register online at www.familyoffice.com/RGLP20

Note: credit card payments over \$7,500.00 are subject to a 3.5% fee on the entire payment.

For event registrations, refunds of payment 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.