



FOX RISING GEN VIRTUAL FORUM

FOX Rising Gen Virtual Forum
October 7-8, 2020

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

– 2019 Attendee

The **2020 FOX Rising Gen Virtual Forum** is an opportunity for family members in their 20's, 30's, and 40's to connect, build relationships, and have authentic conversations with peers in similar situations. Participants learn, make genuine connections, and explore best practices in navigating the unique challenges facing wealthy families.



The FOX Rising Gen Virtual Forum offers an interactive and engaging environment to focus on thought-provoking topics:

- Understand how one family member turned his curiosity and passion for exploration into OceanGate, a company that builds deep ocean submersibles and offers a chance to take an expedition of a lifetime.
- Dive into the concept of resiliency, and what it takes to recover when something doesn't go the way you've planned.
- Learn from a well-regarded investment consulting firm about the risks and rewards of investing in newer alternative assets like cryptocurrency, cannabis, and technology. We will also discuss the recent pandemic and how you as Rising Gen family members can use your resources to contribute to making this world a better place.
- Breakout sessions featuring FOX subject matter experts on: Direct Investing, Family Boards, Cybersecurity, Virtual Family Meetings, and Foundations and Influence on Family Philanthropy.
- Join your fellow Rising Gen community for a virtual happy hour, where we'll connect in ways that will allow you to get to know each other, exchange ideas and learn from each other.

All times Central

DAY 1 AGENDA: Wednesday, October 7

10:00 AM	Opening Comments
10:15 AM	Icebreaker
10:25 AM	Exploring the Depths of a Passion for Building a Business
11:30 AM	Break
11:40 AM	Concurrent FOX Expert Breakout Sessions
12:40 PM	Closing Comments
4:30 PM	Happy Hour
6:00 PM	Happy Hour Concludes

DAY 2 AGENDA: Thursday, October 8

10:00 AM	Opening Comments
10:05 AM	Constructing Meaningful and Impactful Investment Portfolios Panel
11:10 AM	Break
11:20 AM	Resilience & Recovery in Unprecedented Times
12:25 PM	Closing Comments
12:40 PM	Forum Concludes



FEATURED TOPICS

KEYNOTE SESSIONS

EXPLORING THE DEPTHS OF A PASSION FOR BUILDING BUSINESS

Stockton Rush
CEO, OceanGate

After pursuing a career in the skies – at 19, he was the youngest licensed jet transport pilot – and as a tech investor, Stockton Rush turned his curiosity and passion for exploration into OceanGate, a company that builds deep ocean submersibles and offers researchers and citizens alike a chance to take an expedition of a lifetime. We will hear his pioneering story about innovation, design, and a desire to push boundaries in exploration of some of the world’s deepest ocean sites.

EXPLORING NEW SKILLS

CONSTRUCTING MEANINGFUL AND IMPACTFUL INVESTMENT PORTFOLIOS PANEL

Michael P. Hotz, CFA
Vice President, Asset Consulting Group

Katherine Kroll
Senior Institutional Sustainable Investing Specialist,
Brown Advisory

Whether in the form of investment themes like cannabis, cryptocurrency and artificial intelligence - or a values-based ESG approach, investors today have more opportunities than ever before. A well-regarded investment consulting firm will lead an interactive discussion about how to effectively integrate your personal values, beliefs and interests into your investment portfolio.

RESILIENCE & RECOVERY IN UNPRECEDENTED TIMES

Bill Lyons
Senior Director, Institute for Family Culture,
Abbot Downing

In the face of a Global Pandemic and the economic and social volatility of the past year, principles of resilience and recovery are in the forefront of our thinking about wealth management and generational succession. Throughout history, these principles have been at the core of wealth creation and wealth transfer. Capacity to identify change, respond to challenges, take action and learn from experience have been essential to sustain wealth across generations. Reflecting on history, personal experience and examples from families of unique wealth allow us to identify lessons that enhance our skill and capacity to recover from setbacks, adapt to change and lead in the face of adversity. In this interactive session, Bill Lyons, Senior Director with Abbot Downing’s Institute for Family Culture, will share six domains of resilience and recovery, facilitate a dialogue about your definition of resilience, share stories, best practices and tools to foster resilience and recovery in unprecedented times.

PEER EXCHANGE

RISING GEN PEER EXCHANGE AND NETWORKING

Join us for breakout sessions featuring FOX Subject Matter Experts on a wide variety of topics including:

- Direct Investing
- Family Boards
- Cybersecurity
- Virtual Family Meetings
- Foundations and Influence on Family Philanthropy



FIELD OF STUDY: Finance | Up to 4 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 Internet Based

LEARNING OBJECTIVES: Upon completion of this program, participants will gain an understanding of strategies to become a successful entrepreneur, an overview of concepts to enable self resiliency, and opportunities to consider in new alternative asset classes.

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.



PROGRAM REGISTRATION

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

HOW TO REGISTER

Due the current unprecedented circumstances, we are offering this forum, one time only, to all qualified members as a benefit and not charging Rising Gen family members to attend. (Typically a cost of \$1900) There is no limit in attendance per family, we encourage multiple members of a family to attend.

- If you are not a member of Family Office Exchange, please contact info@familyoffice.com for membership information.
- Advance registration is required. All Attendees must register on-line, or submit this form by **October 6, 2020** to participate.

Email: events@familyoffice.com

Online: familyoffice.com/RGF2020

Phone: [312.327.1221](tel:312.327.1221)

ATTENDEE INFORMATION

As part of the FOX Rising Gen Virtual Forum, FOX will utilize a mobile app, desktop portal, and attendee networking function that includes an attendee listing section, allowing attendees to contact each other during the forum. Within the attendee listing, your first and last name as submitted in your registration will be automatically visible to all FOX Rising Gen Virtual Forum attendees, unless you decline below.*

- I agree to my name appearing in the attendee listing.
- I do NOT agree to my name appearing in the attendee listing.

Name (First/Last)*

Name of Firm/Family Office*

Title/Position*

Street Address*

City* State/Province*

Country* Zip/Postal Code*

Phone*

E-mail*

REGISTRATION QUESTIONS

Please select your age range:*

20-29 30-39 40+

Please select your generation in the family:*

G1 G2 G3 G4 G5 G6 Unknown

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

What is your desired role in the future?*

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

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

Where do you currently live?* (city/state)

Please select your breakout session *

- Direct Investing
- Family Boards
- Cybersecurity
- Virtual Family Meetings
- Foundations and Influence on Family Philanthropy

*Indicates a required field, and must be completed before submitting form via email.

Cancellation Details: All cancellations must be made in writing to Family Office Exchange at events@familyoffice.com. For more information regarding administrative policies please contact FOX office at: [312.327.1200](tel:312.327.1200).