

**FOX
Wealth
Advisor
Forum**

May 11-13, 2021
Virtual Event

The **FOX Wealth Advisor Forum** brings to the forefront the topics, issues and insights that advisors need to navigate new opportunities.

This year's forum will explore managing challenging family dynamics, how to harness the energy of society reopening, the transformational role of the family advisor, tailoring your firm's value proposition, and much more.

"Great sessions and easy opportunity to learn about timely topics for wealth advisors."

- 2020 Virtual Attendee

FOX Wealth Advisor Forum

May 11-13, 2021
Virtual Event

FORUM SCHEDULE (U.S. Central time)

Tuesday, May 11, 10:00 am - 1:00 pm

Wednesday, May 12, 10:00 am - 12:30 pm

Thursday, May 13, 10:00 am - 1:00 pm

WHO SHOULD ATTEND

All FOX Members, including Advisors and Family Office Executives, are encouraged to attend this virtual forum.

Advisors, family members, and single-family office executives are encouraged to join us for sessions on May 11. May 12 and May 13 sessions are open to Advisors.

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at familyoffice.com/WAF21 or contact your relationship manager. For questions, please contact us at events@familyoffice.com.

*Up to 6 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. Please visit the forum website for additional information.



FEATURED SESSIONS

Make a Positive Impact Alongside Families, featuring Rockefeller Philanthropy Advisors

Join us for this discussion of philanthropic shifts happening with families and the advisor's role in facilitating the planning, including the story of how to listen to the needs of families and support a client's process toward achieving their philanthropic vision.

The Great Unwinding: How to Thrive as the World Re-opens, with Rob Wolcott, Co-Founder, and Chairman of The World Innovation Network

Rob will explain the 'great unwinding' of 2021 and how organizations can harness the powerful yet chaotic energy that will be unleashed on the world as society opens back up. By the end of this session, attendees will be inspired and prepared to leverage the powerful energy that 2021 and beyond will bring.

How to Prioritize Diversity in Your Organization with panelists from Asset Consulting Group, Perkins Coie, PURE and Warner Norcross + Judd LLP

This conversation will showcase what your fellow FOX members are doing to make diversity a priority in their firm. You will walk away with concrete examples of how to implement and execute impactful diversity initiatives, regardless of your budget size.

Discover the Transformational Role of the Family Advisor with panelists from the American College of Financial Services and Northern Trust

Panelists will explain how attendees can adapt and develop their skills to better serve families of wealth during transitions. The discussion will also cover how the role of the advisor is changing, and what is driving the change.

Explore Your Firm's Value with Eric Almquist, Advisory Partner at Bain & Company

Eric will help attendees understand the full range of factors that contribute to purchases, including both rational and emotional. He will explain how firms can tailor their value propositions accordingly and how managers can determine the best way to add value to their offerings.

The forum will also feature breakouts on virtual marketing and branding and navigating challenging family dynamics.