FOX FAMILY OFFICE FORUM

July 12-13, 2022
Chicago, IL
and Virtual

This program will bring together various c-suite family office executives and senior managers, including HR, legal, tax and technology heads as well as family members, to discuss the most critical challenges and opportunities that family offices are dealing with.

Family office experts will provide case studies, stories, and presentations that allow attendees walk away with concrete ideas on how to enhance the operations of the family office and positively impact the families they serve. From tax, legal, and risk management considerations, to talent and family office operations, this forum has something for every family office executive to learn from.

"Highly timely topics and excellent speakers discussing how to be better professionals in supporting our families and teams."

- Past Forum Attendee

FOX Family Office Exchange

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FORUM SCHEDULE

Tuesday, July 12 | 10:00 AM - 5:00 PM

Wednesday, July 13 | 10:00 AM - 2:30 PM

WHO SHOULD ATTEND

All FOX members may attend virtually, with unlimited attendees from your family office or firm. Please note qualified non-members may register to attend this event virtually. Please contact FOX for more information.

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at **familyoffice.com/FOF22** or contact us at **events@familyoffice.com**

<table>
<tr><th rowspan="2"></th><th>In-Person</th><th colspan="2">Virtual</th></tr>
<tr><th>Member</th><th>Member</th><th>Non-Member</th></tr>
<tr><td>INDIVIDUAL ATTENDEES</td><td>Credit or US $2,500</td><td rowspan="2">Unlimited</td><td>$895</td></tr>
<tr><td>MULTIPLE ATTENDEES FROM THE SAME FAMILY</td><td>Credit or US $2,250</td><td>NA</td></tr>
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*Up to 6.5 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. Please visit the forum website for additional information.

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FEATURED SESSIONS

2022 Trust, Tax, and Estate Planning Update

Don't miss this in-depth tax, trust, and estate planning update. Recent trust and estate litigation cases will be examined, as well as trust and fiduciary state laws. Current UHNW tax audit practices will be addressed in addition to a discussion on how to manage the tax challenges that come along with states trying to tax beneficiaries who live in different locations than their trusts. Discover what to watch out for and what you should consider doing to protect the clients you serve.

Cracking the Family Office Talent Code

It's no secret the UHNW world is facing a myriad of talent challenges, from increased outsourcing to designing competitive incentive and compensation programs, to convincing the family that the office needs more staff. Join a panel of trusted family office advisors with deep family office HR experience as they address these often-nuanced situations.

Developing an Effective Total Compensation Program

As Family Offices evolve and become more complex, attracting the right talent to deliver and manage services requires compensation that is competitive with other professional firms. Join this session to discover how family offices can create a compensation program that attracts unrivaled talent to serve the family.

Managing Outsourced Services for Family Offices

Many family offices choose to outsource services for a variety of reasons including their inability to hire in-house staff for all areas of service. This session will feature panelists with family office outsourcing experience in functions like tax compliance, payroll, human resources, bill pay, and more.

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