FAMILY ADVISOR TRAINING PROGRAM

2022 Fall/Winter Program

The FOX Family Advisor Training Program will equip wealth advisors and family office professionals with the qualitative skills needed to meet the demands of increasingly complex client relationships. Through a unique inside-out-approach, you will work on self-discovery and develop self-mastery to improve how you effectively engage with others – both your clients and your team.

The training will be delivered in a hybrid format, consisting of two virtual 90-minute sessions followed by a 2-day in-person intensive, and concluded with a 90-minute virtual session.

PRESENTERS

Jeff Strese
Family Learning and Leadership Consultant

Mindy Kalinowski Earley, CMP, CFBA
Chief Learning Officer, FOX Learning Center

Sara Hamilton
Founder and Family Advisor

Allison Lawshe
Learning Center Program Manager

David Toth
Program Sponsor and Managing Director

FOX Family Office Exchange

October 20 | 90-minute virtual	Cohort Launch
November 2 | 90-minute virtual	Style Inventory Interpretation
November 16-17 | 2-day in person intensive	Developing Leadership Skills Managing Change & Transitions Family Dynamics & Engagement
December 13 | 90-minute virtual	Application & Accountability

FOX

WHAT TO EXPECT

- Learn to adapt your communication style.
- Understand emotional intelligence.
- Cultivate fundamental coaching skills.
- Develop an understanding of the stages of organizational change.
- Learn to prepare the rising generation for ownership and leadership.
- Connect qualitative skills with financial skills.
- Understand the fundamentals of family systems..

PROGRAM AT A GLANCE

The FOX Family Advisor Training Program will equip wealth advisors and family office professionals with the qualitative skills needed to meet the demands of increasingly complex client relationships. Through a unique inside-out-approach, you will work on self-discovery and develop self-mastery to improve how you effectively engage with others – both your clients and your team.

WHO SHOULD ATTEND

Registration is open to advisors and family office professionals with recurring interaction with families involving complex issues, such as family dynamics, rising gen prep, and succession planning. Advisors with an appetite to develop their own self-mastery as an aspiring or current team leader will also benefit from this program.

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at **familyoffice.com/FATP2022** or contact your relationship manager. For questions, please contact us at **events@familyoffice.com**. Registration closes October 19th. Up to 10.5 CPE Credits can be earned.

OCTOBER 20 — 90-MINUTE VIRTUAL

COHORT LAUNCH

- Meet Your Cohort
- Program Overview & Expectations
- Introduction to Style Inventory

NOVEMBER 2 — 90-MINUTE VIRTUAL

STYLE INVENTORY INTERPRETATION

- Style Inventory Interpretation
- Develop Cohort Learning Goals

NOVEMBER 16-17 — 2 DAY IN PERSON INTENSIVE

DEVELOPING LEADERSHIP SKILLS

- Communication Styles & Emotional Intelligence
- Team Leadership & Coaching Skills

MANAGING CHANGE & TRANSITIONS

- Building Trust
- Change Management

FAMILY DYNAMICS & ENGAGEMENT

- Family Systems
- The Evolution of Multi-generational Families
- Rising Gen Development

DECEMBER 13 — 90-MINUTE VIRTUAL

APPLICATION & ACCOUNTABILITY SESSION

- Cohort Reconnection
- Personal Development Plan Updates
- Problem Solving & Action Planning

	FOX MEMBER	NON-MEMBER
INDIVIDUAL ATTENDEES	US $5,600	US $7,000
MULTIPLE ATTENDEES FROM THE SAME FAMILY/FIRM	US $5,000	US $6,300

PROGRAM MODULES

Cohort Launch (virtual: October 20)
In addition to meeting your cohort, this first virtual session will provide a program overview, set expectations for the cohort learning model, and introduce the DiSC style inventory which you will complete after the session.

Style Inventory Interpretation (virtual: November 2)
To develop and lead others, you must first understand yourself. Complete the Everything DiSC to uncover your own effective communication style and inform how you communicate with, work with and lead others. In this second virtual session, we will conduct a first level interpretation of the Everything DiSC as a group to build self-awareness as preparation for the in-person intensive.

Communication Styles & Emotional Intelligence
(in-person: November 16)
Gain an understanding of your own communication style and how to adapt it to build client relationships and improve team dynamics. Building on the knowledge and skills of communication, improve your emotional intelligence (EQ) to effectively navigate professional and client relationships and the emotions of others.

Family Systems (in-person: November 16)
Understand the fundamentals of family systems and patterns related to communication, culture, relationships, and succession. professional and client relationships and the emotions of others.

The Evolution of Multi-generational Families
(in-person: November 16)
Understand how families evolve on their journey and how diversity and complexity impact each family. Learn 5 important questions to identify the family challenges they face, and how governance evolves as the family matures through the generations.

Rising Gen Development (in-person: November 16)
Understand how to communicate with, develop and prepare the rising generation for ownership and leadership within the family enterprise. Strengthen working relationships with the next generation and learn how rising gen fit into and are impacted by family governance.

Building Trust (in-person: November 16)
Gain skills needed to foster trust-building behaviors and consensus-building among family members to improve decision-making.

Change Management (in-person: November 17)
Develop an understanding of the stages of organizational change and the impact it has on families and organizations. Learn to guide clients and your own teams through times of change.

Team Leadership & Coaching Skills (in-person: November 17)
Develop fundamental understanding and practice coaching skills to effectively coordinate multi-disciplinary client teams and lay the groundwork for navigating family dynamics.

Personal Development Plan (in-person: November 17)
Prepare a personal development plan to translate learning into action after the program and strengthen accountability.

Application & Accountability (virtual: December 13)
Reconnect with your cohort to discuss progress towards your personal development plan, share learnings, and explore solutions to challenges you are facing.

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