FAMILY ADVISOR TRAINING PROGRAM

2022 Spring/ Summer 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 and to develop the talent in your own team. Through a unique inside-out-approach, you will work on self-discovery and develop self-mastery to improve how you lead 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 & Leadership Consultant

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

Sara Hamilton
Founder and Family Advisor

Allison Lawshe
Center Program Manager

David Toth
Program Sponsor and Managing Director

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April 13 | 90-minute virtual	Cohort Launch
April 27 | 90-minute virtual	Style Inventory Interpretation
May 4-5 | 2-day in person intensive	Leading a Client Team Managing Change & Transitions Family Dynamics and Engagement
June 8 | 90-minute virtual	Application & Accountability

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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 and to develop the talent in your own team. Through a unique inside-out-approach, you will work on self-discovery and develop self-mastery to improve how you lead 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. The program is for those with increasing responsibility to lead others involved in client engagements.

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at familyoffice.com/FAT22 or contact your relationship manager. For questions, please contact us at events@familyoffice.com. Registration closes April 8. Up to 9.5 CPE Credits can be earned.

APRIL 13
90-MINUTE VIRTUAL

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

APRIL 27
90-MINUTE VIRTUAL

STYLE INVENTORY INTERPRETATION
- Style Inventory Interpretation
- Develop Cohort Learning Goals

MAY 4-5
2-DAY IN PERSON INTENSIVE

LEADING A CLIENT TEAM
- Communication Styles
- Emotional Intelligence
- Team Leadership

MANAGING CHANGE & TRANSITIONS
- Change Management
- Rising Gen Development

FAMILY DYNAMICS & ENGAGEMENT
- Family Systems & Governance
- Building Trust

JUNE 8
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

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PROGRAM MODULES

Cohort Launch (virtual: April 13)
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: April 27)
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 (in-person: May 4)
Adapting communication style to meet the needs of client service is critical to building a trustworthy, long-term relationship. Gain an understanding of your own communication style and how to adapt it to build client relationships and lead your team.

Emotional Intelligence (in-person: May 4)
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.

Team Leadership (in-person: May 4)
Develop fundamental understanding and practice coaching skills to effectively coordinate multi-disciplinary client teams and lay the groundwork for navigating family dynamics.

Change Management (in-person: May 4)
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.

Rising Gen Development (in-person: May 4)
Understand how to 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.

Family Systems & Governance (in-person: May 5)
Understand fundamentals of family systems and governance to effectively identify and navigate complex family relationships and communication patterns, including family decision-making systems and how they evolve over time.

Building Trust (in-person: May 5)
Gain skills needed to foster trust-building behaviors among family members to improve decision-making.

Application & Accountability (virtual: June 8)
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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