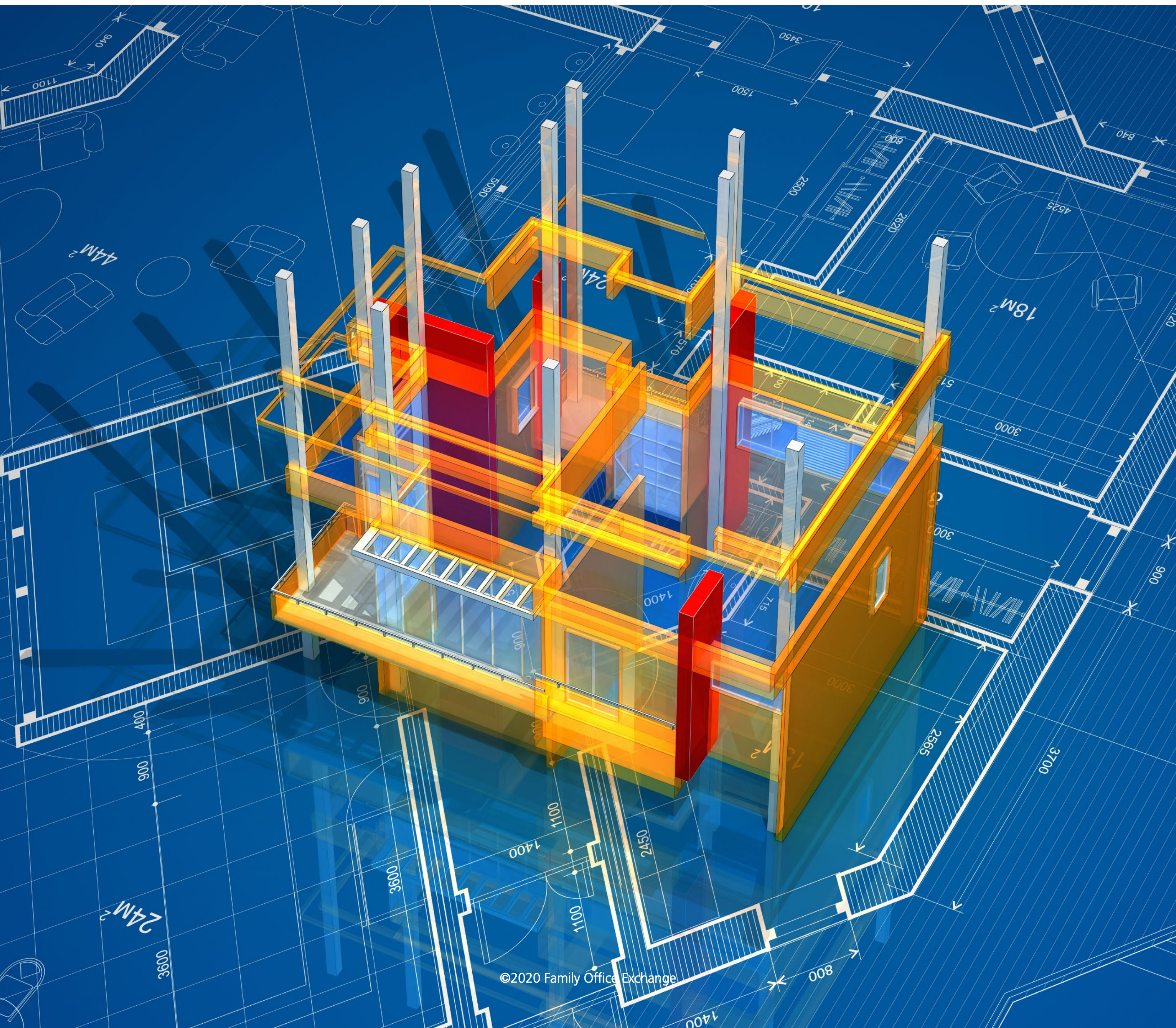
NEW DATES

Family Office Exchange | 30 YEARS

FOX Family Office Design Virtual Workshop

Virtual Event | September 9-11 and November 2, 2020



FOX Family Office Design Virtual Workshop Overview

Virtual Event | September 9-11 and November 2, 2020

All times listed are in Central Time

The FOX Family Office Design Workshop will cover basic principles of a well-run family office and provide tools and techniques to professionalize the office. Come and learn the basics or get a refresher on how to improve operations and take your office, or the one you are planning, to the next level. With nearly 30 years of collective intelligence, FOX will share best practices regarding what steps to take, when to take them, and how to avoid costly mistakes and setbacks.

What to Expect

- Understand the critical dimensions of a family office
- Review the range of services that can be provided by a family office
- Explore the talent and team structure needed to run an office
- Gain insights into operational challenges and technology solutions
- Learn about the cost and complexity of the office and total wealth management
- Identify methods for oversight of the family office and measuring performance of the office
- Receive individualized advice and perspective in a 1:1 session with FOX experts after the workshop

Who Should Attend

Ideal for new family office executives, family members considering starting a family office, or individuals looking to improve operations of an early-stage family office.

Workshop at a Glance

The workshop includes FOX proprietary concepts, practical solutions, and incorporates new data from our recent family office benchmarking survey. The program will be interactive, including presentations, case studies, discussion, and networking with your peers to share individual experiences.

Wednesday, September 2 - Workshop Pre-Call

10:00 AM Group Q&A and Review of Pre-Reading (60 minutes)

Wednesday, September 9

10:00 AM Welcome and Introductions
10:30 AM Family Goals and Family Office Roles
11:00 AM Break
11:15 AM Scope of Services and Service Delivery
11:45 AM Service Exercise
12:15 PM Day 1 Concludes

Thursday, September 10

10:00 AM Case Studies on Types of Offices
10:15 AM Talent and Team Structure
10:45 AM Break
11:00 AM Value and Cost of the Family Office
11:30 AM Ownership, Governance, and Metrics
12:15 PM Day 2 Concludes

Friday, September 11

10:00 AM Welcome and Q&A
10:15 AM Technology and the Family Office
11:00 AM Break
11:15 AM Measures of Success / Best Practices
11:45 AM Initial Design for Your Family Office
12:00 PM Next Steps, Final Questions, and Wrap-up
12:15 PM Day 3 Concludes

Monday, November 2 - Group Strategic Planning

Talk through with peers and the FOX team about the design process for their respective offices.

10:00 AM Welcome and Q&A
10:15 AM Design for Your Family Office
11:00 AM Break
11:15 AM Design for Your Family Office
12:00 PM Final Questions and Wrap-up

Optional Individual Q&A and Strategic Planning

Individual Q&A and Planning Session. (60 minutes)

MODULE 1

Family Goals and Family Office Roles

Defines and introduces building blocks and sophisticated concepts behind family offices including reasons to form and maintain an office, various types, evolution, functions and purpose, and other attributes of offices. The office's central role as risk manager and other roles are introduced.

MODULE 2

Scope of Services and Service Delivery

Sets forth the universe of services provided by family offices and how they are delivered in a customized and integrated manner to meet the technical requirements of managing a family's wealth and enhance family meetings, educate the next generation, among other benefits.

MODULE 3

Talent and Team Structure

Introduces the notion that the integrity of the family office staff has the greatest impact on the office's success. This session examines the roles and responsibilities of staff members, organizational structures, mapping of key skills to services, coordination and oversight of third-party advisors, and compensation.

MODULE 4

Value and Cost of the Family Office

Family offices have a wide range of costs and the important relationship between cost, breadth of service, and complexity will be explored. Total cost of wealth management will also be examined.

MODULE 5

Ownership, Governance, and Metrics

Provides an understanding of family office board structures and functions as well as decision-making processes in family offices, with reference to mission, leadership, and succession. Benefits of governance and appropriate degrees of formality are addressed.

MODULE 6

Technology and the Family Office

The family office is the primary source of consolidated financial information. This session addresses the integration challenge inherent in consolidating data from multiple sources.

MODULE 7

Measures of Success / Best Practices

With an exploration of best practices, this interactive session is designed to clarify your next steps in the family office design process and explore ways to help you measure success.

MODULE 8

Initial Design for Your Family Office

Through concepts and templates provided to participants during the session, this discussion will focus on strategies for designing and refining your family office.

Charles B. Grace, III

Managing Director, Family Office Exchange

Charles B. Grace, III is a Managing Director at Family Office Exchange (FOX) and based in New York City. He works primarily on Advisory Group projects at FOX for multi-generational families and family offices covering all aspects of wealth management. Assignments have included strategic planning, generational transitions, family office design and assessment, governance, operations and processes, development of investment programs, advisor due diligence, and best practices. Charlie is also active at FOX with family office and wealth advisor members as well as the firm's thought leadership and original research. Charlie has been active for 20 years in the family office community advising high net worth families and serving as a resource to family offices. He graduated with a J.D. from the Washington College of Law. Charlie received a B.A. and M.A. in history from Bates College and the American University, respectively.

Sara Hamilton

Founder and Chief Executive Officer, Family Office Exchange

Sara Hamilton is the Founder and CEO of Family Office Exchange (FOX). Sara is a recognized visionary and credited with professionalizing the family office industry. Sara founded FOX in 1989 as a peer network for family office executives. Within 10 years, FOX could see that families needed help with their enterprise vision, managing financial transitions, and educating family members on responsible ownership. Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting family enterprises, family office executives, and wealth advisory firms in more than 20 countries. FOX has built a unique team of professionals serving multigenerational families, led by 15 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, and Madrid.

Glen W. Johnson

Chief Operating Officer, Family Office Exchange

Glen Johnson is Chief Operating Officer at Family Office Exchange (FOX). In this role, he is responsible for all aspects of the member experience, ensuring that each family member, family office executive, and trusted advisor has an unsurpassed experience partnering with FOX by providing unique industry knowledge and insights coupled with a safe and confidential environment where members can share best practices. Glen has over 30 years of experience working with family offices, business owners, and executives, first as an attorney and then as a wealth advisor, eventually founding Mirador Family Wealth Advisors – the multi-family office for Fifth Third Bank. Glen earned a Bachelor of Sciences degree in Education from the University of Michigan in Ann Arbor, MI and a Juris Doctorate degree from Wayne State University Law School in Detroit, MI.

Kent Lawson

Technology Advisor, Family Office Exchange

Kent Lawson is a key resource for FOX and leads endeavors focused on technology among other important deliverables to clients of FOX. Kent has spent over 25 years serving the wealth management community in a variety of roles.

He has run his own organizations providing strategic leadership as a trusted advisor and has more than a decade of technology, vendor experience, and over 10 years at the executive level within a single family office.

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.

FIELD OF STUDY **Finance** | Up to **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.

PROGRAM LEVEL **Overview | No prerequisites are required for any of the sessions.**

DELIVERY METHOD **Group Live Program**

LEARNING OBJECTIVES Upon completion of this program, participants will gain an understanding of the steps required, and mistakes to avoid, when developing an effective family office. Additional program objectives include: insights regarding oversight of the family office, services scope and delivery, costs of the family office, talent and team structure, technology and data security, performance metrics and best practices, and family office planning steps.

FOX Family Office Design Virtual Workshop Registration

Virtual Event | September 9-11 and November 2, 2020

HOW TO REGISTER

Advance registration is required. All Attendees must register on-line, or submit this form by September 2, 2020 to participate.

Email: **events@familyoffice.com**

Online: **familyoffice.com/FOD20**

Phone: **312.327.1221**

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

Reset This Form | Email This Form to Register

REGISTRATION OPTIONS - PLEASE SELECT

	FOX MEMBER	NON-MEMBERS
FIRST PAID ATTENDEE	☐ $2,500	☐ $3,000
ADDITIONAL PAID ATTENDEES	☐ $2,250	☐ $2,700

ATTENDEE INFORMATION

Name (First/Last)*

Name of Firm/Family Office*

Title/Position*

SHIPPING ADDRESS FOR PROGRAM MATERIALS

Street Address*

City* State/Province*

Country* Zip/Postal Code*

Phone*

E-mail*

REGISTRATION QUESTIONS

Please identify your role:*

I am a family member I am a family office executive

Do you have a formal family office?*

Yes, I have a formal family office No, I do not have a formal family office

If you have a formal family office, what year was it established?

How do you identify your role(s) in the family/family office?* (Mark all that apply)

Business Leader
Family Leader
Board Chairperson
Board Member
Trustee
Rising Gen Leader
Family Office Executive
Philanthropic Director
Advisor to Family
Other

Which generation provides family leadership today?* (Check one)

G1 G2 G3 G4 G5 G6 G7 G8

Which generation are you?* (Check one)

G1 G2 G3 G4 G5 G6 G7 G8 NA (if FO Exec.)

What do you hope to learn from this workshop?*

Which of these topics are most important to you in your situation?* (Please rank each option below 1-8, 1 being the most important and 8 being the least.)

Family Goals and Family Office Roles
Scope of Services and Service Delivery
Talent and Team Structure
Ownership, Governance, and Metrics
Value and Cost of the Family Office
Technology and the Family Office
Measures of Success / Best Practices
Initial Design for Your Family Office

PAYMENT METHOD

To pay by credit card please call the Events Team directly at 1.312.327.1221 and provide credit card details or register online at **www.familyoffice.com/FOD20**

Note: credit card payments over $7,500.00 are subject to a 3.5% fee on the entire payment.

All registrations subject to approval by Family Office Exchange. For event registrations, refunds of payment will be offered if the cancellation is made in writing to Family Office Exchange at events@familyoffice.com five (5) or more business days prior to the start of the event. For more information regarding complaints or administrative policies please call 312-327-1200.