FOX FAMILY OFFICE DESIGN WORKSHOP

Nov. 17-19, 2021
Virtual Event

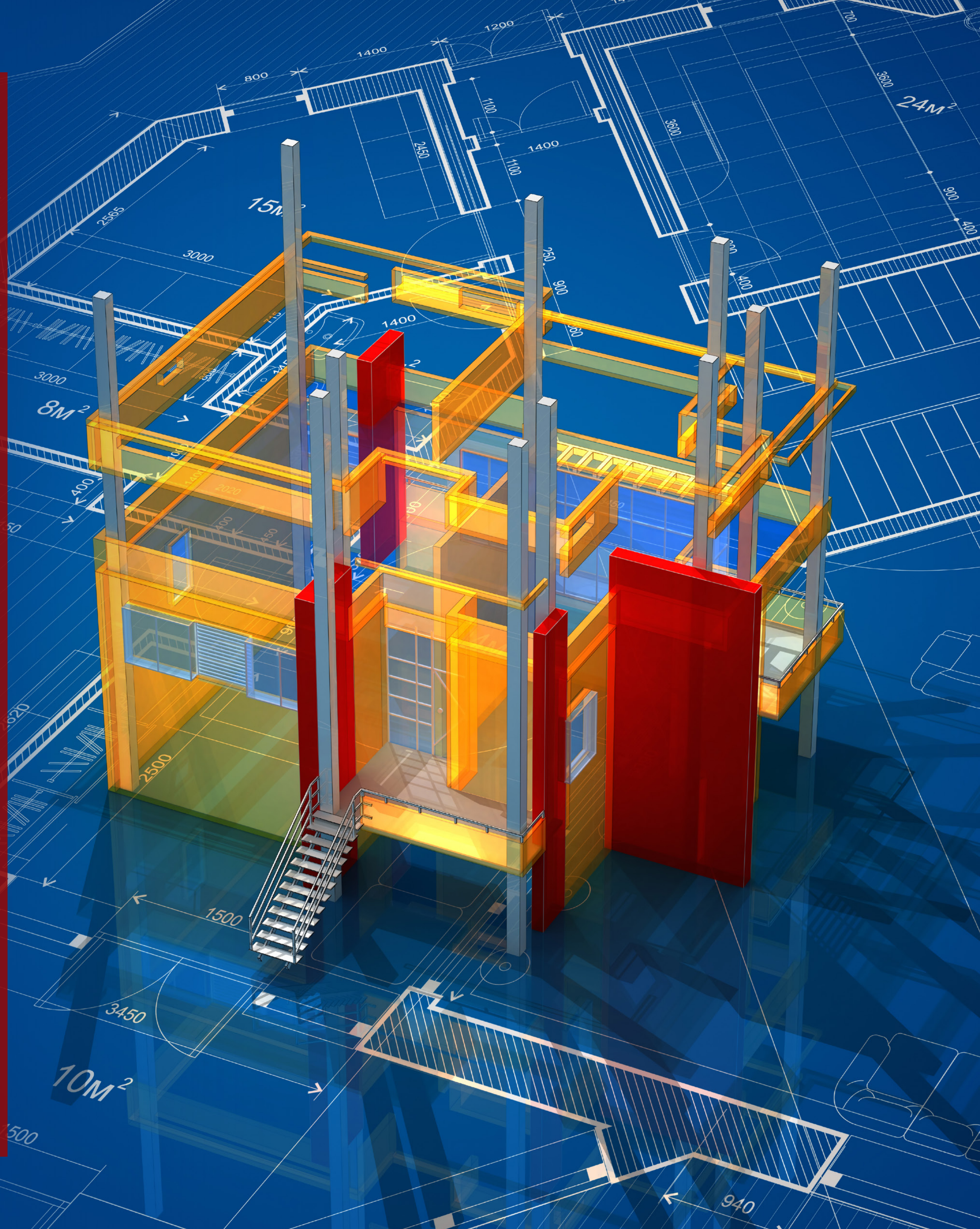
The FOX Family Office Design Workshop will cover basic principles of a well-run family office and provide tools and techniques to professionalize the office.

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 over 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.

“This workshop provides a great overview and understanding of what a family office is and how other family offices practice and the challenges/focuses they have.”

- 2020 Attendee

Family Office Exchange®



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.

PRESENTERS

Sara Hamilton, Founder and CEO, FOX

Glen W. Johnson, Chief Operating Officer, FOX

Gaby Griffin, Market Leader, Business Owners and Family Office Executives, FOX

Scott Winget, Market Leader, Enterprise Families, FOX

Kent Lawson, Director, Technology Integration Services, FOX

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at **familyoffice.com/FO21** or contact your relationship manager. For questions, please contact us at **events@familyoffice.com**.

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.

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 AGENDA OVERVIEW

All times listed are in U.S. Central Time

WED, NOV 17

1:00 PM
Introductions and Expectations

1:50 PM Break

2:00 PM
Family Office Goals and Roles

2:50 PM Break

3:00 PM
Scope of Services and Service Delivery

3:50 PM Q & A

4:00 PM Day 1 Concludes

THU, NOV 18

10:00 AM
Organization and Team Structure

10:50 AM Break

11:00 AM
Technology to Support the Family Office

11:50 AM Q & A

12:00 PM Break

1:00 PM
Complexity and Cost of the Family Office

2:00 PM Day 2 Concludes

FRI, NOV 19

10:00 AM
Ownership and Governance

10:50 AM Break

11:00 AM
Q & A and Lessons Learned

12:00 PM Break

1:00 PM
Initital Design and Next Steps for Your Office

1:50 PM
Final Questions

2:00 PM Day 3 Concludes

WORKSHOP MODULES

MODULE 1: Family Office Goals and 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: Organization 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: Technology to Support the Family Office

The Technology of the Family Office is a direct reflection of the family goals, office roles, and scope of services. This session will focus on the architecture of technology that integrates the core aspects of the office and how the overall hub to Technology is the family itself.

MODULE 5: Complexity 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 6: Ownership and Governance

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 7: Q & A and Lessons Learned

Learn from real-life examples of families like yours that have built their own family office, why they succeeded and where they struggled.

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.