

**FOX GLOBAL
FAMILY OFFICE
DESIGN
WORKSHOP**

June 1-3, 2022
Virtual Event

The FOX Global Family Office Design Workshop covers basic principles of a well-run family office and provides tools and techniques to professionalize the office.

Come and learn the basics or get a refresher on how to improve operations of an early stage office 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. The workshop will also include separate discussions by global region that may impact the structural, regulatory, tax and operational issues most relevant to them.

"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





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.
- Discuss global regional differences that may impact the design and operations.

PRESENTERS

Glen W. Johnson, President of Membership, 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

Miguel López de Silanes Gómez, Market Leader, Europe and Latin America, FOX

TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at familyoffice.com/FOD22 or contact your relationship manager. For questions, please contact us at events@familyoffice.com.

Registration closes May 23.

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, JUNE 1	THU, JUNE 2	FRI, JUNE 3
10:00 AM Introductions and Expectations	10:00 AM Organization and Team Structure	10:00 AM Ownership and Governance
11:00 AM Family Office Goals & Roles	11:00 AM Technology to Support the Family Office	11:00 AM Case Study & Action Steps
12:00 PM Break	12:00 PM Break	12:00 PM Break
1:00 PM Scope of Services & Service Delivery	1:00 PM Complexity and Cost of the Family Office	1:00 PM Initial Design and Next Steps for Your Office
2:00 PM Breakouts	2:00 PM Breakouts	1:50 PM Workshop Wrap-up
3:00 PM Day 1 concludes	3:00 PM Day 2 concludes	2:00 PM Breakouts
		3:00 PM Day 3 concludes

	FOX MEMBER	NON-MEMBER
INDIVIDUAL ATTENDEES	US \$2,900	US \$3,600
MULTIPLE ATTENDEES FROM THE SAME FAMILY	US \$2,600	US \$3,250



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: Case Study & Action Steps

Review specific examples of various types of single-family offices and why families will utilize different structures as well as objectives for these offices.

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.