Family Office Exchange | 30 YEARS

FOX FAMILY OFFICE DESIGN WORKSHOP

November 19-20, 2019 | Convene Conference Center | Chicago, IL

The 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

WHO SHOULD ATTEND

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

WORKSHOP AT A GLANCE

The workshop includes FOX proprietary concepts, practical solutions, and incorporates new data from our 2019 family office benchmarking survey. The program will be interactive, including presentations, case studies, discussion, and networking with your peers to share experiences. The workshop will also feature a FOX member sharing their own journey in managing a family office through transition.

DAY 1 - Tuesday, November 19	DAY 2 - Wednesday, November 20
8:00 am – 9:00 am: Breakfast	**7:30 am – 8:30 am**: Breakfast
9:00 am – 12:00 pm: Overview and Services	**8:30 am – 12:00 pm**: Cost and Governance
12:00 pm – 1:00 pm: Lunch	**12:00 pm – 1:00 pm**: Lunch
1:00 pm – 4:30 pm: Talent and Technology	**1:00 pm – 3:00 pm**: Measures of Success and Best Practices
4:30 pm: Meeting Adjourns	**3:00 pm**: Meeting Adjourns
6:00 pm – 8:00 pm: Cocktails and Dinner	

DAY 1 - Tuesday, November 19

MODULE 1

Overview of the Family Office and Structures

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 Integrated Services and Method of 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

Technology and Data Security

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

DAY 2 - Wednesday, November 20

MODULE 5

Costs of the Family Office and Total Wealth Management

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

Family Office 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

Measures of Success in the Family Office and 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.

Charles B. Grace, III

Managing Director, Family Office Exchange (FOX)

Charlie works on Advisory Services projects for families and family offices as well as advisor clients. Assignments have included projects focused on strategic planning, family office and family enterprise design, family governance, selection of investment or wealth advisors, best practices, and benchmarking, among others. On the membership side of the FOX business, Charlie works on select relationships and develops and delivers content using deep subject matter expertise.

Charlie has been active for 20 years in the family office community advising ultra-wealthy families and serving as a resource to multigenerational families and family offices. Prior to joining FOX, he spent almost 10 years at the multi-family office Ashbridge Investment Management LLC and the single-family office Ashbridge, LLC.

Charlie is on the Executive Committee, Investment Committee and serves as Treasurer of the nonprofit Tuttle Fund, Inc. in New York City. He graduated from the Washington College of Law with a J.D. Charlie received a B.A. and M.A. in history from Bates College and American University, respectively.

Glen W. Johnson

Chief Operating Officer, Family Office Exchange (FOX)

Glen 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. In addition, Glen oversees the operations of FOX and is charged with establishing and executing systems to execute FOX's strategic plan, promoting its vision and service-centric culture, and enabling the FOX team to work together to exceed our member's expectations.

Glen has over 30 years of experience working with 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. He has worked with business owners and executives across all stages of their business life cycle including business succession. Glen writes and speaks nationally focusing on family and business governance and the unique challenges faced during the sale and transition of closely held businesses.

Glen earned a Bachelor of Science 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.

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 **13 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 and family enterprise strategy. 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.

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Workshops are open to family members and family office executives. All registrations are subject to approval by FOX.

THREE WAYS TO REGISTER

1. **Scan and email** to: events@familyoffice.com
2. **Register online** at: www.familyoffice.com/FOD19
3. **Fax this form** to: 1.312.327.1212

ATTENDEE INFORMATION

Select information will be used for your badge including city and state.

Name (First/Last)

Name of Firm/Family Office

Title/Position

Street Address

City State/Province

Country Zip/Postal Code

Phone

E-mail

Do you have any dietary or special needs?

REGISTRATION OPTIONS - PLEASE SELECT BELOW

	FOX MEMBER	NON-MEMBERS
FIRST PAID ATTENDEE	☐ $3,600	☐ $4,200
ADDITIONAL PAID ATTENDEES	☐ $3,250	☐ $3,775

FAMILY OFFICE DESIGN WORKSHOP

November 19-20, 2019

PAYMENT METHOD

❍ **Payment by check is enclosed.** *(Check payable in U.S. dollars to Family Office Exchange)*
Family Office Exchange ATTN: Events
100 South Wacker Drive, Suite 800, Chicago, IL 60606

❍ **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/FOD19

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

For event registrations, refunds of payment or forum allotments 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.

LOCATION AND ACCOMMODATIONS

Convene Conference Center
311 West Monroe Street
Chicago. IL 60606

Convene has discount arrangements with a number of conveniently located hotels. Please visit the program website at familyoffice.com/FOD19 for additional details. Workshop attendees are responsible for making their own accommodation arrangements.

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? (Circle one)
G1 G2 G3 G4 G5 G6 G7 G8

Which generation are you? (Circle one)
G1 G2 G3 G4 G5 G6 G7 G8

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 1-7, 1 being the most important and 7 being the least.)

____Overview of the Family Office and Structures
____Scope of Integrated Services and Method of Service Delivery
____Talent and Team Structure
____Technology and Data Security
____Costs of the Family Office and Total Wealth Management
____Family Office Governance
____Measures of Success in the Family Office and Best Practices

Do you plan to attend cocktails and dinner on Tuesday, November 19?
❍ Yes ❍ No