

FOX Global Investment Forum

Virtual Event | July 14-17, 2020



Overview

Due to the ongoing pandemic, the 2020 FOX Global Investment Forum has gone virtual. Over the course of four days, the FOX community's most sophisticated private capital investors will explore what's on investing's horizon, including emerging technology, social impact, and trending opportunities.

The forum will provide an opportunity to connect with peers from FOX families for meaningful exchange of ideas and discussions about what the future of investing holds for you.

Who Should Attend

All FOX members, including family office executives and advisors, are encouraged to attend this year's forum. There is no limit on attendance per member firm.

Agenda at a Glance

Forum Sponsors



Tuesday, July 14

- 10:00 am Welcome and What's on the Minds of Members
- 10:10 am Highlights from the 2020 FOX Global Investment Survey
- 10:30 am What Now? The Economy, Investing, and Elections
- 11:20 am Break
- 11:30 am Uncorrelated Strategies: Preparing for the Ride Ahead
- 12:20 am Q & A and Wrap-Up
- 12:30 pm Day 1 Concludes

Wednesday, July 15

- 10:00 am Introduction to Day 2
- 10:05 am Harnessing the Power of Artificial Intelligence
- 10:55 am Break
- 11:05 am The Dynamic Ecosystem of Blockchain, Bitcoin, and Cryptocurrency
- 11:55 am Q & A and Wrap-Up
- 12:00 pm Day 2 Concludes

Thursday, July 16

- 10:00 am Introduction to Day 3
- 10:05 am Vertical Approach to Venture Investing
- 10:55 am Break
- 11:05 am Peer Dialogue
 - Direct Investing Network
 - FOX Strategic Investors
 - FOX Advisors
- 11:50 am Day 3 Concludes

Friday, July 17

- 10:00 am Introduction Day 4
- 10:05 am The Emerging Influence of Social Impact Investing
- 10:55 am Break
- 11:05 am Innovation's Impact on Investment Opportunities
- 11:55 am Q & A and Wrap-Up
- 12:00 pm Forum Concludes

Presenters



Thomas J. Anderson
Author
Money without Boundaries



Catherine Berman
CEO
CNote



Jeff Brown
Managing Partner, Political Economy,
LLC, Board Chair, CFM Partners, Inc.



Andrew Eberhart
Managing Partner
Wingspan Capital



Constance Freedman
Founder and Managing Partner
Moderne Ventures



Charles B. Grace, III
Managing Director
Family Office Exchange



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



Sara Hamilton
Founder and CEO
Family Office Exchange



Kristin Hull, PhD
Founder and CEO
Nia Impact Capital



Glen W. Johnson
Chief Operating Officer
Family Office Exchange



Miguel López de Silanes Gómez
Managing Director for International
Members, Family Office Exchange



Stephen Martiros
Founder and CEO
Financial Building Blocks



Mary Jo Palermo
Chief Investment Officer
Cambridge Associates



Scott Sasslow
Founder and CEO
One World



Rudina Seseri
Founder and Managing Partner
Glasswing Ventures



Bill Sullivan
President
Family Office Exchange



Jonathan Tunner
Director, Private Investment Opportunities
Family Office Exchange



Robert C. Wolcott
Co-Founder & Chairman, TWIN Global;
Adjunct Professor of Innovation, Kellogg School
of Management at Northwestern, Booth
School of Business, University of Chicago

Tuesday, July 14

10:00 am Welcome

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

Identifying the trends and issues affecting families of wealth is a large part of our mission at FOX. We'll explore what's top-of-mind for members right now.

10:10 am Highlights from the 2020 FOX Global Investment Survey

Miguel López de Silanes, Managing Director for International Members, Family Office Exchange

Identifying the trends and issues affecting families of wealth is a large part of our mission at FOX. We'll explore what's top-of-mind for members through the latest results of our 2020 Global Investment Survey.

10:30 am What Now? The Economy, Investing, and Elections

Jeff Brown, Managing Partner, Political Economy, LLC, Board Chair, CFM Partners, Inc

Covid-19 may accelerate the impact of several already evident trends in politics, the economy, and financial markets. Will economic concentration, along with wealth and income disparity, continue to grow? The U.S. and China were already battling over trade, but will how each handled the pandemic lead to a full-blown cold war? Will globalization reverse

and what does that mean for public and private investors? How will the pandemic drive November's U.S. elections? Which industries and companies did the virus and lockdowns forever change? We will explore these questions and more during our virtual session.

11:20 am Break

11:30 am Uncorrelated Strategies: Preparing for the Ride Ahead

Mary Jo Palermo, Chief Investment Officer, Cambridge Associates Andrew Eberhart, Managing Partner, Wingspan Capital Charles B. Grace, III, Managing Director, Family Office Exchange

During up markets, like those of the last 10 years, good returns can lull investors into a sense of complacency. But what are their exposures and strategies if markets head down or go sideways? What are the perceived marketplace risks and what questions should they be asking? Which lessons from the past are relevant and which aren't? We'll dive into the value of uncorrelated strategies, with a look at alternative investments, including private equity funds and hedge funds.

12:20 pm Q & A and Wrap-Up

12:30 pm Day 1 Concludes

Wednesday, July 15

10:00 am

Introduction to Day 2

Glen W. Johnson, Chief Operating Officer, Family Office Exchange

10:05 am

Harnessing the Power of Artificial Intelligence

Rudina Seseri, Founder and Managing Partner, Glasswing Ventures
Stephen Martiros, Founder and CEO, Financial Building Blocks

In less than a decade, artificial intelligence (AI) has gone from a fringe research topic to a reality, revolutionizing industries across the sophistication spectrum. If you haven't implemented AI yet, you soon will. So it's essential you understand AI's transformative nature, its real-world successes and future potential, and what sets companies that use AI apart. Rudina Seseri of Glasswing Ventures and Stephen Martiros of Financial Building Blocks will share perspectives on AI's current trends, applications, and opportunities to drive productivity and reshape the world.

10:55 am

Break

11:05 am

The Dynamic Ecosystem of Blockchain, Bitcoin, and Cryptocurrency

Thomas J. Anderson, Author, *Money without Boundaries*

New York Times best-selling author, and technology innovator Tom Anderson will help you connect old currency ideas to new technologies. As billions of dollars pour into blockchain and cryptocurrency—with trillions more depending on the outcome—investors need to form their own conviction hierarchy around this emerging and dynamic ecosystem. We'll explore the implications of, and use cases for these emerging technologies and currencies, and discuss the potential for a megatrend convergence. You'll gain a greater understanding of the foundational concepts, as well as how future trends may affect industries, markets, government, and policy.

11:55 am

Q & A and Wrap-Up

12:00 pm

Day 2 Concludes

Thursday, July 16

10:00 am

Introduction to Day 3

Sara Hamilton, Founder and CEO, Family Office Exchange

10:05 am

Vertical Approach to Venture Investing

**Constance Freedman, Founder and Managing Partner
Moderne Ventures**

Technology trends like AI, robotics, blockchain, and cybersecurity are poised to seismically change global industry, what is their true potential for investment impact? Constance Freedman will talk about assessing general investment strategies against large vertical opportunities, how you should think about true market sizes, which firms are most likely to succeed, and how an investor can add value and get involved. You'll hear real-world examples of successful partnerships between family offices, corporations, and industry executives who have found unique investment opportunities and created meaningful value by applying a vertical approach to a general venture strategy.

10:55 am

Break

11:05 am

Peer Dialogue

- **FOX Direct Investing Network**

Open to FOX Direct Investing Network members and investors, and family offices interested in discussing direct investment opportunities.

- **FOX Strategic Investors**

Open to wealth owners and single-family offices.

- **FOX Advisors**

Open to all FOX member advisors from multi-family offices and investment advisory firms, as well as FOX specialist advisors.

11:50 am

Day 3 Concludes

Friday, July 17

10:00 am

Introduction to Day 4

Bill Sullivan, President, Family Office Exchange

10:05 am

The Emerging Influence of Social Impact Investing

Catherine Berman, CEO, CNote

Kristin Hull, PhD, Founder and CEO, Nia Impact Capital

Scott Sasslow, Founder and CEO, One World

As more investors align their investment strategies with their social values, considerable debates have grown too. Can impact investing deliver market-rate returns? What opportunities exist for investing in areas such as gender equality, climate, or a particular community? What practical steps have other family offices taken to realize competitive rates and achieve measurable social impact? Learn about the opportunities and challenges, as well as what's happening across the social impact industry, during a "fireside chat" with two active social impact investors.

10:55 am

Break

11:05 am

Innovation's Impact on Investment Opportunities

Robert C. Wolcott, Co-Founder & Chairman, TWIN Global; Adjunct Professor of Innovation, Kellogg School of Management at Northwestern, Booth School of Business, University of Chicago

With Covid-19, we've all crossed the Digital Rubicon. Professor Wolcott will offer foresight about the next few years and beyond, and what it might mean for business leaders and investors.

11:55 am

Q & A and Wrap-Up

12:00 pm

Forum Concludes

Registration Form (All registrations subject to approval by Family Office Exchange)

Registration Questions

Is this your first time attending the FOX Global Investment Forum?*

☐ Yes ☐ No

What is your primary role within your family / family office investment process?

- ☐ Family member making investment decisions on behalf of yourself or your family
- ☐ CEO (or sr. mgmt) with responsibilities over investments
- ☐ Family member interested in educating yourself on investment topics
- ☐ CIO of a family office
- ☐ Investment Committee member
- ☐ Other

Are you a family member/wealth owner?*

☐ Yes ☐ No

If yes, which generation?

☐ Gen 1 ☐ Gen 2 ☐ Gen 3 ☐ Gen 4 (or greater)

What is your top investment concern looking forward?*

Please select a Peer Dialogue.*

- ☐ **FOX Direct Investing Network**
Open to FOX Direct Investing Network members and investors, and family offices.
- ☐ **FOX Strategic Investors**
Open to wealth owners and single-family offices.
- ☐ **FOX Advisors**
Open to all FOX member advisors from multi-family offices and investment advisory firms, as well as FOX specialist advisors.

If you were referred to this event, please advise who referred you.

There is no cost for FOX members to attend the FOX Global Investment Forum. There is no limit on attendance per member firm.

If you are not a member of Family Office Exchange, please contact info@familyoffice.com for membership information.

Attendee Information

As part of the Global Investment Forum, FOX will utilize a mobile app, desktop portal, and attendee networking function that includes an attendee listing section, allowing attendees to contact each other during the forum. Within the attendee listing, your first and last name as submitted in your registration will be automatically visible to all FOX Global Investment Forum attendees, unless you decline below.*

- ☐ I agree to my name appearing in the attendee listing.
- ☐ I do NOT agree to my name appearing in the attendee listing.

Name (First/Last)*

Name of Firm/Family Office*

Title/Position*

Street Address*

City*

State/Province*

Country*

Zip/Postal Code*

Phone*

E-mail*

Cancellation Details: All cancellations must be made in writing to Family Office Exchange at events@familyoffice.com. For more information regarding administrative policies please contact FOX office at: [312.327.1200](tel:312.327.1200).

How to Register

Advance registration is required. All Attendees must register on-line, or submit this form by July 13, 2020 to participate.

Email: events@familyoffice.com

Online: familyoffice.com/GIF2020

Phone: [312.327.1221](tel:312.327.1221)

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



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FIELD OF STUDY: Finance | Up to 7 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 Internet Based

LEARNING OBJECTIVES: Upon completion of the program, participants will gain an understanding trends related to sophisticated private capital investing amid significant market volatility.