Family Office Exchange

FOX Private Trust Company Workshop

Virtual Event | January 26-28, 2021 | familyoffice.com/PTC2021

The Private Trust Company (PTC) has passed the test of time as a robust structure for achieving the multi-generational goals of wealth preservation, stewardship, and long-term family governance. This program is essential for families and executives with an established PTC that want to better operate their unique PTC structure. We will bring together PTC Executives, family members and experts to share their experience and insight about the PTC's special role in the family enterprise.

Workshop at a Glance

The Private Trust Company (PTC) has passed the test of time as a robust structure for achieving the multi-generational goals of wealth preservation, stewardship, and long-term family governance.

This program is essential for families and executives with an established PTC that want to better operate their unique PTC structure. We will bring together PTC Executives, family members and experts to share their experience and insight about the PTC's special role in the family enterprise.

What to Expect

- Discuss how complexity within the family enterprise impacts the Private Trust Company and about opportunities to mitigate and manage it.
- Explore opportunities to create healthy trustee and beneficiary relationships and develop a culture of stewardship.
- Review options to coordinate the roles of the family office and PTC.
- Gain insights from experts on current and potential strategic and operational risks impacting PTCs.
- Hear family stories about how PTCs are navigating generational shifts and trends to serve more effectively.

Who Should Attend

The Private Trust Company Workshop is open to family members, PTC board members, and family office and PTC executives that are in the process of forming or have an established PTC. The workshop is not for those who are considering forming a PTC, for whom a separate workshop will be scheduled at a later date. FOX also reserves limited seats for qualified prospective members who are operating a PTC. All registrations subject to approval by FOX.

All times listed are in U.S. Central Time

Tuesday, January 26

10:00 AM Welcome to the Workshop

10:10 AM Attendee Meet and Greet

10:30 AM Articulating the PTC's Value in Light of Complexity

11:20 AM Break

11:30 AM Executive Panel Discussion: The Evolution of PTC Value and Complexity

12:20 PM Closing Remarks

12:20 PM Day 1 Concludes

Wednesday, January 27

10:00 AM Opening Remarks

10:10 AM The Pull of Purpose: Finding Freedom Through Stewardship

11:00 AM Break

11:10 AM Small Group Topical Discussions

12:00 PM Day 2 Concludes

Thursday, January 28

10:00 AM Opening Remarks

10:10 AM PTC Evolution: Risks and Opportunities

11:00 AM Break

11:10 AM Breakout Sessions

- **The Family Enterprise: Folding the Family Office and PTC Together**
- **Trustee-Beneficiary Relationships: Are They Reflecting Your Family Culture?**

12:00 PM Break

12:15 PM Bringing It All Together: A Family PTC Story

1:10 PM Closing Remarks

1:20 PM Day 3 Concludes

Guest Presenters

Nicole Belytschko
Board and Investment Committee Member, Wind River Trust Company; Chief Investment Officer, C.M. Capital Advisors

Bruce Betters
CEO and Chief Investment Officer
Marshall Street Capital

John Dziminski
President
The Rosewood Corporation

Ryan Harding
President
Garden Trust Company
and
Managing Director
IFO Group, LLC

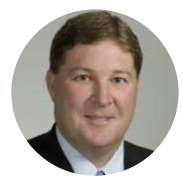
Alan Heath
Chairman and CEO
Wind River Trust Company

Richard Johnson
Partner
Waller Lansden Dortch & Davis, LLP

Melissa Kirkby
Vice President
The Bill Kitt Trust Company, LLC

Susan Roh
President
Wind River Trust Company

Domingo Such
Firmwide Chair,
Family Office Services Practice
Perkins Coie LLP



Matt Tobin
Managing Director
Chief Operating Officer & Legal Counsel, South Dakota Trust Company LLC

David R. York, Esq., CPA
Managing Partner
York Howell & Guymon

FOX Presenters

Ruth Easterling
Managing Director, Member Services
Family Office Exchange

Sara Hamilton
Founder and CEO
Family Office Exchange

Scott Winget
Market Leader, Enterprise Families
Family Office Exchange

FOX Private Trust Company Workshop Agenda

Virtual Event | January 26-28, 2021

Tuesday, January 26, 2021

10:00 am Welcome to the Workshop

10:10 am Attendee Meet and Greet

10:30 am Articulating the PTC's Value in Light of Complexity

Sara Hamilton, Founder and CEO, FOX

Scott Winget, Market Leader, Enterprise Families, FOX

Your PTC provides tremendous value to the family, but how do you reinforce that value, especially considering administrative burdens and perceived complexity? Reviewing a new FOX study, we will explore how family offices articulate their own value proposition to their clients and what drives complexity with a focus on the PTC.

11:20 am Break

11:30 am Executive Panel Discussion: The Evolution of PTC Value and Complexity

Ryan Harding, President, Garden Trust Company and Managing Director, IFO Group, LLC

Melissa Kirkby, Vice President, The Bill Kitt Trust Company, LLC

PTC executive panelists, all in different stages and with varying experiences, will talk about how the family derives value through the Private Trust Company, complexity and how they deal with it.

12:20 pm Closing Remarks

12:30 pm Day 1 Concludes

Wednesday, January 27, 2021

10:00 am Opening Remarks

10:10 am The Pull of Purpose: Finding Freedom Through Stewardship

David R. York, Esq., CPA, Managing Partner, York Howell & Guymon

We live in a world that tells us how to live, what matters, and how to get it. These impersonal, external forces, along with "the meteors" from well-meaning but controlling estate plans, push us around and leave us off-balance, confused, and fatigued. Among us, however, are those who live differently.

Held steady by the pull of purpose, they live in an upward spiral of clarity, vision and balance that provides them freedom and allows them to leverage their blessings, including gifts in trust, to make lasting impacts in the World. These people have found the secret to a life lived as…a Steward. This presentation will outline the mindset, characteristics, and traits of these remarkable people and how you can create a Steward mentality for yourself, your family, and the organizations of which you are a part.

11:00 am Break

11:10 am Small Group Topical Discussions

Breakout sessions will feature topics identified by participants on registration forms and be facilitated by subject matter experts.

12:00 pm Day 2 Concludes

Thursday, January 28, 2021

10:00 am Opening Remarks

10:10 am PTC Evolution: Risks and Opportunities

Domingo Such, Firmwide Chair, Family Office Services Practice, Perkins Coie LLP

John Dziminski, President, The Rosewood Corporation

Matt Tobin, Managing Director, Chief Operating Officer & Legal Counsel, South Dakota Trust Company LLC

The PTC is a strategic structure in the family enterprise that continues to evolve. This panel of experts brings insight about trends, potential risks, and opportunities, such as conflicts of interest, digital applications, cybersecurity, interstate decision making and special interest trust structures.

11:00 am Break

11:10 am Breakout Sessions

The Family Enterprise: Folding the Family Office and PTC Together

Bruce Betters, CEO and Chief Investment Officer, Marshall Street Capital

Richard Johnson, Partner, Waller Lansden Dortch & Davis, LLP

The Family Office and Private Trust Company both play essential roles in supporting a family's long-term strategy. Whether starting up or through generational transitions, both of these structures need to adapt their roles to the changing needs of the family. This session provides insights about optimizing the family office and private trust company within your family system.

11:10 am Breakout Sessions *(Continued)*

Trustee-Beneficiary Relationships: Are They Reflecting Your Family Culture?

David R. York, Esq., CPA, Managing Partner, York Howell & Guymon

Your family has said that they want to develop their heirs to be productive, independent, happy individuals. Are you supporting those values through your trustee-beneficiary relationships?

12:00 pm Break

12:15 pm Bringing It All Together: A Family PTC Story

Alan Heath, Chairman and CEO, Wind River Trust Company

Nicole Belytschko, Board and Investment Committee Member, Wind River Trust Company, Chief Investment Officer, C.M. Capital Advisors

Susan Roh, President, Wind River Trust Company

Through one family's experience this session brings to life applying stewardship in the investment and trust practices of a PTC evolving through executive and family generational shifts.

1:10 pm Closing Remarks

1:20 pm Day 3 Concludes

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 **6 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 this program, participants will be able to more efficiently operate their unique PTC structure. Program objectives include: understand how complexity within the family enterprise impacts the Private Trust Company and the opportunities to mitigate and manage those complexities, explore opportunities to create healthy trustee and beneficiary relationships and develop a culture of stewardship, review options to coordinate the roles of the family office and private trust company, gain insights from experts on current and potential strategic and operational risks impacting Private Trust Companies, and navigate generational shifts and trends to serve more effectively.

FOX Private Trust Company Workshop Registration

Virtual Event | January 26-28, 2021

HOW TO REGISTER

This workshop is not for those who are considering forming a PTC, for whom a separate workshop will be scheduled at a later date.

Advance registration is required. All attendees must register online, or submit this form by January 20, 2021 to participate.

Email: **events@familyoffice.com**

Online: **familyoffice.com/PTC2021**

Phone: **312.327.1221**

*Required field 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	☐ $1,300	☐ $1,600
ADDITIONAL PAID ATTENDEES	☐ $1,150	☐ $1,450

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

ATTENDEE INFORMATION

I agree to my name appearing in the attendee section.

I do NOT agree to my name appearing in the attendee section.

(First/Last)*

Name of PTC / Family Office / Firm*

Title/Position*

Street Address*

City* State/Province*

Country* Zip/Postal Code*

Phone*

E-mail*

REGISTRATION QUESTIONS

Do you have a Private Trust Company?*

Yes In the process of forming

If yes (or in the process of forming): In what state is your PTC chartered?*

Which best describes your role* (Mark all that apply)

PTC Executive

PTC Board Member

Family Office Executive

Family Member

Other (please describe)

Please select you breakout session for January 28. (Choose one)*

The Family Enterprise:
Folding the Family Office and PTC Together

or

Trustee-Beneficiary Relationships:
Are They Reflecting Your Family Culture?

Please provide a few ideas for the "Topical Group Discussions.*

For example:
Trust strategies and structures
Operations, administration and audits
Beneficiary development
Trust distribution process
Governance Structure (or Boards and Committee structures)

Your Ideas:

What are your learning objectives for this workshop?*

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/PTC2021**

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.