

# FOX Global Owners Forum™

April 19-20, 2018 | Loews Chicago Hotel | Chicago, IL

The **FOX Global Owners Forum™** attracts family members from around the world. It is programmed exclusively for the owners of family enterprises. It is a place where owners can be together with their true peers in an energizing learning and sharing environment.

The event offers a lively mix of family enterprise best practices and case studies, discussion of how families can make an impact in business, philanthropy, and society, and a deep dive into new approaches to family learning with case studies and a roundtable discussion by leading educators.

The best way to understand what happens at the **FOX Global Owners Forum** is to know why people have attended in the past. These are the goals of past attendees:

1. To meet other family members who have similar challenges
2. To have other members of their family, who are less involved, participate in the Forum and learn
3. To gain insights on engaging fellow G2s and G3s on long-term governance and maintenance of family continuity and assets
4. To find the right methods for educating and inspiring future generations and supporting them in leading a productive life, realizing their future potential

5. To be reminded of things we still need to do to improve our organization, and learn best practices
6. Meet international families in business
7. Share thoughts on entrepreneurial activities of family enterprises
8. Evaluate FOX for our family
9. Get advisor recommendations
10. Set priorities for our own family's work on building the "enterprise"

## New for the Rising Generation

FOX is creating the **FOX Rising Gen™** to build a strong, secure community for members of the Rising Generation. It is a place where they can meet others like themselves and learn about the issues of concern to them.

The **FOX Rising Gen** will meet on the Friday evening and Saturday, immediately following the Owners Forum. The rising generation is also invited to actively participate in the Owners Forum, if they like.

Join us April 19 through 20 in Chicago for the **FOX Global Owners Forum** and have your Rising Gen join us for the **FOX Rising Gen** meeting on April 20 and 21.

## Guest Presenters



**Harvey G. Knell**

Founder and President, KCB Management



**Lorin Knell**

Managing Director, KCB Management



**Peter Knell**

Managing Director, KCB Management



**Bruce Boyd**

Principal, Arabella Advisors



**FK Day**

Co-Founder and Executive Vice President, SRAM Corporation  
Co-Founder and Chairman of the Board, World Bicycle Relief



**Robin Steans**

Board Chair, Steans Family Foundation



**Rob Heinrich**

Board Member, Morrison Family Foundation



**Sharna Goldseker**

Executive Director, 21/64



**Mindy Kalinowski Earley, CMP, CFBA**

Lifelong Learning Specialist, RDV Corporation



**Alexandria Elliott**

Learning Officer, Chifam, LLC



**Ernie Patterson**

Vice President, Director of Family Shareholder Relations, Brown-Forman

## FOX Presenters



**Sara Hamilton**

CEO and Founder



**Alexandre Monnier**

President



**Amy Hart Clyne**

Executive Director



**Charles B. Grace, III**

Managing Director



**Miguel Lopez de Silanes**

Managing Director, Europe and Latin America



**Ann Dugan**

Sr. Managing Director, Advisory Services



**Paulina Cromwell**

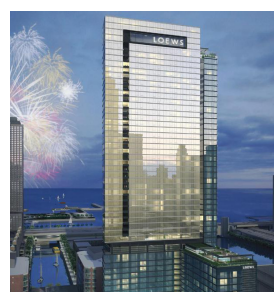
Program Manager, Advisory Services



**Jane Flanagan**

Managing Director

## Venue and Hotel Accommodations



### Loews Chicago Hotel

455 North Park Drive  
Chicago, Illinois, 60611

**1.312.840.6600**

<https://www.loewshotels.com/chicago-downtown>

FOX has reserved a limited number of rooms at the Loews Chicago Hotel at a rate of \$234 per night plus applicable taxes. To obtain this discounted rate, please contact the Loews Chicago Hotel directly at **1.877.868.8232** and mention the **FOX Global Owners Forum**. You may also book rooms online via the FOX website at [www.familyoffice.com/GOF](http://www.familyoffice.com/GOF).

Forum attendees are responsible for making their own accommodation arrangements. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is **Friday, March 23, 2018**.

**12:00 pm Registration and Luncheon**

**1:00 pm FOX Overview of Forum**

**to**  
**5:00 pm FOX Presenter: Amy Hart Clyne**, Executive Director

**Family Enterprise Strategy and Leadership Development**

► **Family Enterprise Best Practices**

**FOX Panelists:** Sara Hamilton, CEO and Founder; Charles B. Grace, III, Managing Director; Miguel Lopez de Silanes, Managing Director, Europe and Latin America

A panel of FOX Enterprise Leaders will share best practices that global families use to strengthen their family enterprises. When the family values the continuation of the family and their enterprise beyond the original operating business, a set of guiding principles and practices lead the way for generations to come.

Topics in this session will include how assets are owned in a family enterprise, how businesses grow, how decisions are made, what family learning and leadership looks like, how boards are selected and evaluated, and what place entrepreneurship holds for the family. Attendees will have the opportunity to ask questions of the panel participants.

► **Case Study – Knell Family Enterprise Strategy and Leadership Development**

**Panelists:** Harvey G. Knell, Founder and President, KCB Management; Lorin Knell, Managing Director, KCB Management; Peter Knell, Managing Director, KCB Management

Upon the sale of the Knell family's operating business, Harvey was confronted with a new set of challenges. How could he work to "let go early"

like his father did so effectively; how he would support the transition of his family wealth; and most importantly to Harvey; how would he ensure critical skills were developed within his family to manage the enterprise? Allowing for the independence his sons desired and establishing accountability were top of mind as his family worked together to establish a successful family enterprise.

Developing their own best practices framework, Harvey Knell and his sons, Lorin and Peter, will share how the family devised their strategy and developed family members as future leaders of their family enterprise.

► **Owner Dialogues – Enterprise Strategy and Leadership Development Discussions**

In roundtable format, share your challenges and your successes as you work towards strengthening various components of your family enterprise, as gathering wisdom from peers is insightful and illuminating.

**5:00 pm Adjourn for the Day**

**6:30 pm Forum Reception and Dinner**

Loews Chicago Downtown Hotel – Roof Deck Terrace



**NEW  
FOX Event**

Immediately following the FOX Global Owners Forum™

# FOX Rising Gen™

The inaugural meeting of a new community of twenty, thirty, and forty-somethings to meet, share, and learn from each other.  
For more information, [click here](#) or go to [www.familyoffice.com/rg](http://www.familyoffice.com/rg).

**Dinner: Friday, April 20**

**Meeting: Saturday, April 21**

**Loews Chicago Hotel**



### 8:00 am Breakfast

### 9:00 am to 12:30 pm Families of Impact

#### Impact Families: Making a Difference in Business, Philanthropy, and Society

##### ► OVERVIEW

**Presenters:** **Bruce Boyd**, Principal, Arabella Advisors; **Paulina Cromwell**, Program Manager, Advisory Services, Family Office Exchange

In this session we will explore how families make a difference on issues that are important to them through their businesses, their investing, and their giving. Increasingly, we observe how families, wishing to make an impact with their wealth in their lifetime, have found creative ways to integrate both business concerns with philanthropic goals. Bruce and Paulina will share introductory comments on best practices in philanthropy, impact investing and environmental/social/governance concerns.

##### ► EXPERIENCE PANEL

**Bruce Boyd**, Principal, Arabella Advisors; **FK Day**, Co-Founder and Executive Vice President, SRAM Corporation / Co-Founder and Chairman of the Board, World Bicycle Relief; **Robin Steans**, Board Chair, Steans Family Foundation; **Rob Heinrich**, Board Member, Morrison Family Foundation

Many families have adopted strategic approaches to the way they run their businesses and their life in an integrated fashion. Some have applied business expertise to their philanthropic causes, and others have pursued impact across all of their investments to promote social and environmental returns. Representatives from three families will share their knowledge and experiences.

##### ► COLLABORATIVE LEARNING CIRCLES

Participants will have the opportunity to rotate through 2 topics of their choice to discuss:

- **Impact Investing** – deploying investment capital for greater social returns
- **Impact Philanthropy** – making a difference on an issue you care about
- **Impact Businesses** – making your business more socially responsible
- **Next Generation Engagement and Leadership** – meeting the expectations of the next generation
- **Rising Generation Entrepreneurship** – fostering new thinking and funding new ventures
- **Impact Evaluation** – how to know if you're making a difference
- **Using Your Time and Voice for Impact** – other approaches for leveraging time and talent

### 12:30 pm Luncheon

### 1:30 pm to 5:00 pm Commitment to Family Learning

#### Breakthroughs in Family Learning: Opening Insights on Goals for the FOX Family Learning Network

**FOX Presenter:** Alexandre Monnier, President

While we are accustomed to quarterly family meetings, monthly portfolio reviews, and annual family philanthropy gatherings, the environment in which families are learning is changing rapidly. At the same time, families are increasingly in search of more engaging learning opportunities for families. Families are seeking to inspire future wealth owners so the rising generation gets a chance to learn from the family and from the peer communities they join.

##### ► How to Make Learning More Engaging: Case Studies and Hands-on Exercises

**Led By:** **Sharna Goldseker**, Executive Director, 21/64

Sharna will share family learning case stories and interactive approaches in family learning that helped build the muscles for exploration, enhanced capacity for critical thinking, and ultimately gave family members the opportunity to develop self-concept to navigate through the world of opportunities available to them. Sharna will describe hands-on tools utilized to engage multi-generation families and how they helped families achieve their goals. You will have the opportunity to utilize the same tools in order to apply them back at home after experiencing them here in this session.

##### ► Roundtable Discussion with Family Learning Network Educators

**FOX Moderator:** **Jane Flanagan**, Managing Director; **Family Educators:** **Mindy Kalinowsky Earley CMP, CFBA**, Lifelong Learning Specialist, RDV Corporation; **Alexandria Elliott**, Learning Officer, Chifam LLC; **Ernie Patterson**, Vice President, Director Family Shareholder Relations, Brown-Foreman

Leading family learning educators will each share 2-3 techniques that have been successful in supporting the unique learning objectives of some of their families. Explore which ones might resonate for you whether you are new at developing an educational curriculum or an experienced family that wants to go deeper. Time will be available for interactive dialogue.

### 5:00 pm Adjourn

# FOX Global Owners Forum™ Registration Form

April 19-20, 2018 | Loews Chicago Hotel | Chicago, IL



Registration for this event is limited to Wealth Owners and Family Office Executives attending with a Wealth Owner. All registrations are subject to approval by FOX.

## Registration Questions

I am a...

- ☐ Family Leader/Member  
☐ Family Office Executive (attending with a family member)

If you are a Family Leader/Member please select your generation:

- ☐ Gen 1 ☐ Gen 2 ☐ Gen 3 ☐ Gen 4 ☐ Gen 5  
☐ Unknown ☐ Not Applicable

What is your primary role within your family?  
(Please list all that apply)

- ☐ Matriarch/Patriarch  
☐ Board Member  
☐ Senior Manager of family business  
☐ Senior Manager of family office  
☐ Foundation Board Member  
☐ Other

If you selected "Other" above please list your primary role and title:

Are you active in direct investments? If yes, please list industries:

- ☐ Yes ☐ No

Please select up to 3 collaborative learning discussion topics that interest you as part of the families of impact session:

- ☐ Impact Investing ☐ Impact Philanthropy  
☐ Impact Business ☐ Impact Evaluation  
☐ Next Gen Engagement and Leadership  
☐ Rising Gen Entrepreneurship  
☐ Using Your Time and Voice for Impact

What is your most urgent family learning issue?

Will you attend the following?

- ☐ Luncheon on Thursday, April 19  
☐ Forum Reception and Dinner on Thursday, April 19  
☐ Breakfast on Friday, April 20  
☐ Luncheon on Friday, April 20

Would you like us to reach out to any of your family members or peers regarding either the Global Owner's Forum and or the Rising Gen?

- ☐ Rising Gen ☐ Global Owners Forum ☐ Both

First Name

Last Name

Email Address

## Questions?

Contact us at [events@familyoffice.com](mailto:events@familyoffice.com) or call 312.327.1221

## Three Ways To Register

1. Scan and email to:

[events@familyoffice.com](mailto:events@familyoffice.com)

2. Register online at:

[www.familyoffice.com/GOF](http://www.familyoffice.com/GOF)

3. Fax this form to:

1.312.327.1212

Space is limited. All attendees must register online or submit this registration form prior to the event to secure a seat.

## Attendee Information

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 special dietary or accessibility needs? (please describe)

Will you be staying at the Loews Chicago Hotel during the FOX Global Owners Forum?

(Please note, attendees are responsible for making their own accommodation arrangements for the Forum. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is Friday, March 23, 2018.

- ☐ Yes, I plan to stay at the Loews Chicago Hotel.  
☐ No, I do not plan to stay at the Loews Chicago Hotel.  
☐ I'm not sure, my plans are not finalized.

How would you like to receive your forum materials?  
(Additional binders will not be available at the event.)

- ☐ I would like to download the materials in advance and will NOT need a binder.  
☐ I would like to receive materials in a binder at the forum.

## Registration Options

	FOX Member	Non Member
<input type="checkbox"/> Use Event Credit Included in FOX Membership Fee	<input type="checkbox"/> \$2,600	<input type="checkbox"/> \$3,150
	Additional Paid Attendees	Additional Paid Attendees
	<input type="checkbox"/> \$2,150	<input type="checkbox"/> \$2,700

If you are not a member of Family Office Exchange, please contact [info@familyoffice.com](mailto:info@familyoffice.com) for membership information.

## Payment Method

☐ Payment by check is enclosed. (Check payable in U.S. dollars to Family Office Exchange)

Please mail check to: **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. 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](mailto: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.



**100 South Wacker Drive, Suite 800 ■ Chicago, IL 60606 USA ■ 1.312.327.1200**

New York, NY ■ 1.646.504.0776 | San Francisco, CA ■ 1.312.327.1265

Madrid, Spain ■ 34.616.94.05.63 | Sydney, Australia ■ 61.414.444.405

[info@familyoffice.com](mailto:info@familyoffice.com) ■ [www.familyoffice.com](http://www.familyoffice.com)