

# FAMILY ADVISOR TRAINING PROGRAM

2023  
Fall  
Program

The FOX Family Advisor Training Program will equip wealth advisors and family office professionals with the qualitative skills needed to meet the demands of increasingly complex client relationships. Through a unique inside-out-approach, you will work on self-discovery and develop self-mastery to improve how you effectively engage with others – both your clients and your team.

The training will be delivered in a hybrid format, consisting of two virtual 90-minute sessions followed by a 2-day in-person intensive, and concluded with a 90-minute virtual session.

## PRESENTERS

**Mandy Chardoul, CPA, MST, CFP®**  
Principal, Top Hand Consulting

**Jeff Strese**  
Family Learning and Leadership Consultant

**Mindy Kalinowski Earley, CMP, CFBA**  
Chief Learning Officer, FOX Learning Center

**Allison Lawshe**  
Learning Center Program Manager

**David Toth**  
Program Sponsor and Managing Director



August 31   90-minute virtual	Cohort Launch
September 14   90-minute virtual	Style Inventory Interpretation
September 20–21   2-day in-person intensive	Developing Leadership Skills Managing Change & Transitions Family Dynamics & Engagement
November 2   90-minute virtual	Application & Accountability



### WHAT TO EXPECT

- Learn to adapt your communication style.
- Understand emotional intelligence.
- Cultivate fundamental coaching skills.
- Develop an understanding of the stages of organizational change.
- Learn to prepare the rising generation for ownership and leadership.
- Connect qualitative skills with financial skills.
- Understand the fundamentals of family systems..

### PROGRAM AT A GLANCE

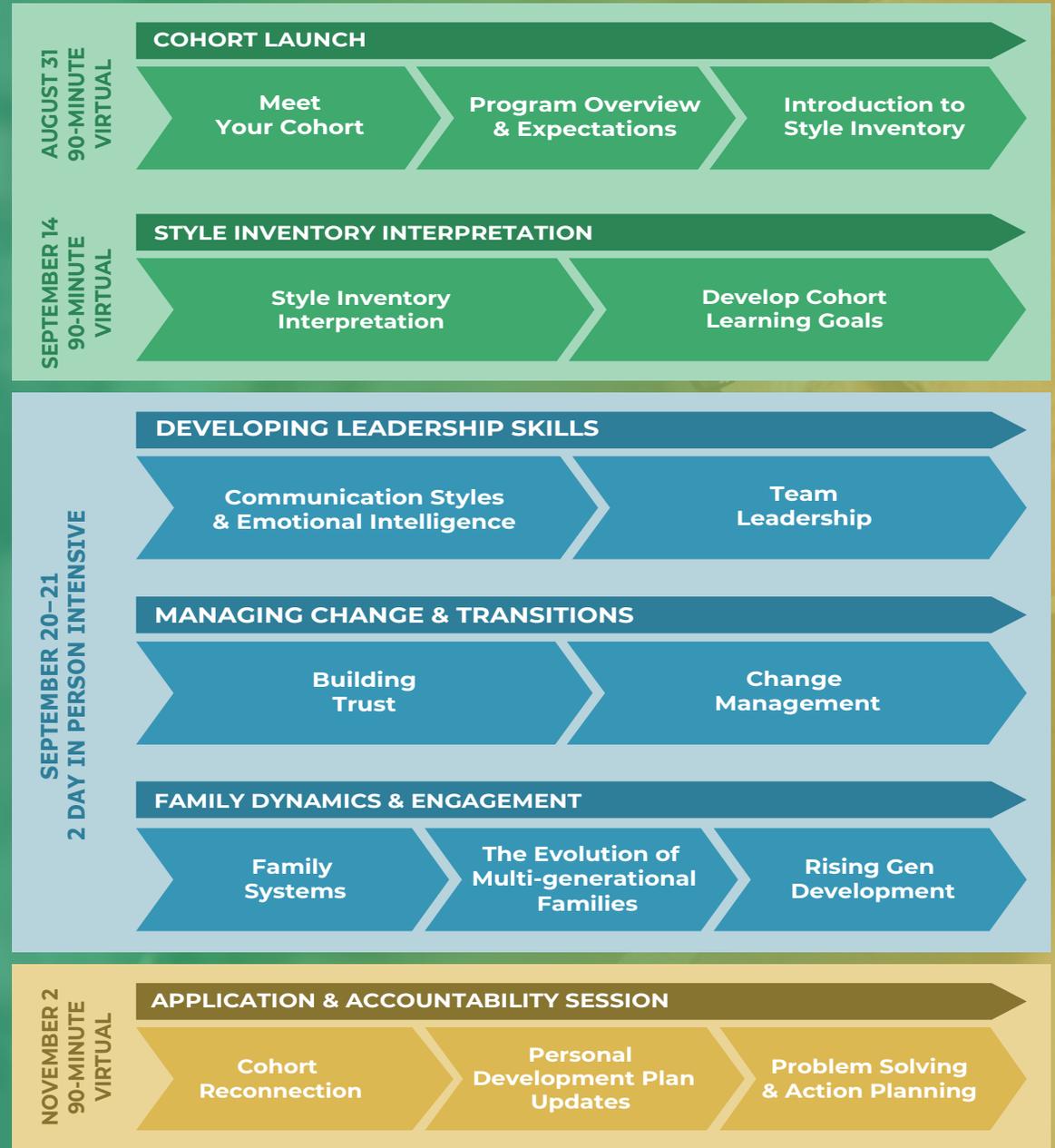
The FOX Family Advisor Training Program will equip wealth advisors and family office professionals with the qualitative skills needed to meet the demands of increasingly complex client relationships. Through a unique inside-out-approach, you will work on self-discovery and develop self-mastery to improve how you effectively engage with others – both your clients and your team.

### WHO SHOULD ATTEND

Registration is open to advisors and family office professionals with recurring interaction with families involving complex issues, such as family dynamics, rising gen prep, and succession planning. Advisors with an appetite to develop their own self-mastery as an aspiring or current team leader will also benefit from this program.

### TO REGISTER AND LEARN MORE

To see the full agenda and register, visit us online at [familyoffice.com/FATPFALL2023](https://familyoffice.com/FATPFALL2023) or contact your relationship manager. For questions, please contact us at [events@familyoffice.com](mailto:events@familyoffice.com). Registration closes August 24<sup>th</sup>. Up to 10.5 CPE Credits can be earned.



	FOX MEMBER	NON-MEMBER
<b>INDIVIDUAL ATTENDEES</b>	<b>US \$5,600</b>	<b>US \$7,000</b>
<b>MULTIPLE ATTENDEES FROM THE SAME FAMILY/FIRM</b>	<b>US \$5,000</b>	<b>US \$6,300</b>



## PROGRAM MODULES

### **Cohort Launch** (virtual: August 31)

In addition to meeting your cohort, this first virtual session will provide a program overview, set expectations for the cohort learning model, and introduce the DiSC style inventory which you will complete after the session.

### **Style Inventory Interpretation** (virtual: September 14)

To develop and lead others, you must first understand yourself. Complete the Everything DiSC to uncover your own effective communication style and inform how you communicate with, work with and lead others. In this second virtual session, we will conduct a first level interpretation of the Everything DiSC as a group to build self-awareness as preparation for the in-person intensive.

### **Communication Styles & Emotional Intelligence**

(in-person: September 20)

Gain an understanding of your own communication style and how to adapt it to build client relationships and improve team dynamics. Building on the knowledge and skills of communication, improve your emotional intelligence (EQ) to effectively navigate professional and client relationships and the emotions of others.

### **Family Systems** (in-person: September 20)

Understand the fundamentals of family systems and patterns related to communication, culture, relationships, and succession. professional and client relationships and the emotions of others.

### **The Evolution of Multi-generational Families** (in-person: September 20)

Understand how families evolve on their journey and how diversity and complexity impact each family enterprise. Learn 8 important questions to help families on their journey, and how you can help get them “un-stuck” when challenges arise.

### **Rising Gen Development** (in-person: September 20)

Understand how to communicate with, develop and prepare the rising generation for ownership and leadership within the family enterprise. Strengthen working relationships with the next generation and learn how rising gen fit into and are impacted by family governance.

### **Building Trust** (in-person: September 20)

Gain skills needed to foster trust-building behaviors and consensus-building among family members to improve decision-making.

### **Change Management** (in-person: September 21)

Develop an understanding of the stages of organizational change and the impact it has on families and organizations. Learn to guide clients and your own teams through times of change.

### **Team Leadership & Coaching Skills** (in-person: September 21)

Develop fundamental understanding and practice coaching skills to effectively coordinate multi-disciplinary client teams and lay the groundwork for navigating family dynamics.

### **Personal Development Plan** (in-person: September 21)

Prepare a personal development plan to translate learning into action after the program and strengthen accountability.

### **Application & Accountability** (virtual: November 2)

Reconnect with your cohort to discuss progress towards your personal development plan, share learnings, and explore solutions to challenges you are facing.

AUG. 31  
90-MINUTE  
VIRTUAL

SEPT. 14  
90-MINUTE  
VIRTUAL

SEPT. 20-21  
2-DAY IN-PERSON  
INTENSIVE

NOV. 2  
90-MINUTE  
VIRTUAL