



Official Marketing Partnership Program

Family Office Exchange (FOX) is the world's most advanced peer network and learning platform for Ultra-High Net Worth (UHNW) families, family offices, and advisors. Our members are leaders and decision-makers in top families family offices and financial advisors who are highly engaged in learning and connecting with peers on critical issues. At FOX, we understand the challenges advisors face in reaching this exclusive group of wealth owners and family offices.

The Official FOX Marketing Partnership Program offers firms the opportunity to make a significant impact by allowing access to this unique audience.

The FOX Community

The FOX membership community represents nearly 400 of the world's leading single family offices, with average investable assets of \$900M. Our key member audiences include:

- Business and wealth owners
- Family Office CIOs
- Family Office Executives
- Multi-family office executives
- Private Investors
- Single-family office executives

About FOX Family Members

970

executives from
500 families

>50%

are engaged in
direct investing

860

wealth owners
from 400 families

72%

are led by
G1 or G2

109

advisor
organizations

>85%

have a family
foundation

It is a good opportunity to learn from others and get new ideas about best practices and supporting the family enterprise.

– FOX Member

Partnership Types at FOX

Official Marketing Partnership Program

As a FOX Official Marketing Partner, you will benefit from a year-long engagement with our global member community with access to and brand exposure at member events via FOX digital assets, event signage, and more. The Official Marketing Partnership Program includes Premier, Executive, and Classic partnership levels and allows networking opportunities across the FOX network to some of the wealthiest families in the world.

Resource Partnership Programs

As a FOX Resource Partner, you will benefit from a year-long engagement tied to one of our resource partner programs, including Technology, Direct Investing, and Cyber and Security. The Resource Partnership Programs include Premier, Executive and Classic partnership levels, and all assets delivered through this partnership are solely related to the program with which they coincide.

About FOX

- Gain insights into complex issues and best practices to tackle them.
- Get access to best practices, checklists, and frameworks for addressing issues.
- Insights and knowledge based on nearly 30 years of experience.
- Learn from key industry speakers, hot topic webinars, and one-to-one personalized guidance.

I learned a lot about myself and my strengths, how to better communicate, family patterns and systems, and leadership skills.

– FOX Member

Resource Partnership Programs

Technology

As a FOX Technology Resource Partner, you will benefit from a year-long engagement with our global member community, including first-hand demonstrations from leading partners focused on family offices and wealth management during the FOX Technology Showcase.

Direct Investing Network

The FOX Direct Investing Network Resource Partnership offers members the opportunity to connect with leaders in the direct investing industry, allowing for deep relationship building and access to deal-making knowledge.

Cyber & Security

As a FOX Cyber & Security Resource Partner, you will benefit from a year-long engagement with our global member community. You will also participate actively in the annual FOX Cyber & Security Showcase; a virtual industry-wide event held each fall.

Participation at FOX events goes beyond traditional opportunities. We work with you to understand your goals and provide insights and guidance to ensure your firm has a significant impact, access, and continuity of positioning throughout the year. Our forums, conferences, workshops, and community networks offer rare opportunities to interact with the world's largest, most qualified family office audience.

The Resource Partnership programs are for qualified firms, and includes special benefits such as enhanced FOX Directory listings and development of an Exclusive Offer to showcase your firm's expertise. (Please inquire)

The Resource Partnership Offers 3 Levels of Engagement

CLASSIC

EXECUTIVE

PREMIER

I like the tight connections and bonds that add the true value to the FOX network of advisors and family offices. It is this network and exchange of quality ideas that is at the core of business ideas and development in our markets.

– FOX Member and Partner

Our Audiences

Families

Family members have extensive options to learn, grow, and connect at FOX. Our signature event, The FOX Family Forum, is held each year to bring families, family office executives, and advisors together to discuss the newest industry trends and explore ways to overcome challenges and leverage opportunities. Family members also benefit from our networks, including our Human Capital Network, Rising Gen Network, and more.

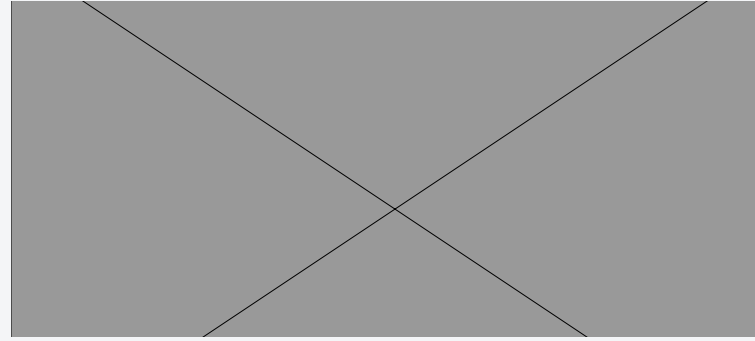
Family Office Executives

Family office executives at FOX have previously benefited from the annual FOX Family Office Forum. At this event, office executives from around the world can discuss the industry's unique challenges and gain valuable information on how to run their offices best and service their families. Additionally, many of our family office executives find benefits in our networks, as they help them provide all-encompassing support to the families they serve.

Investors

To support members with investment interests, we have previously held the Global Investment Forum, an event dedicated to the FOX community's most sophisticated private capital investors as they explore and share best practices, market insights, and private investment opportunities.

Our Direct Investing Network is another platform for investors to engage. The network allows for families and individuals actively involved in direct investing to share information, deals, and experiences with other active investors.



CTO and IT Professionals

The FOX Technology Showcase has been an annual event bringing together the most innovative minds in family office tech and decision-makers from the world's leading families. Solution providers can have open discussions with FOX members and perform demonstrations of their products, giving our community the chance to learn how to address their unique challenges. Our Technology Operations and Data Security Networks also provide excellent opportunities for members to discuss cutting-edge technology servicing the industry.

Wealth Advisors

To provide networking and collaboration between the wealth advisors in our community, FOX has held its Wealth Advisor Forum to allow members of our community to discuss the constantly changing needs of families.

FOX Website Annual Unique Visitors:

- 2020 Page views - 613,381
- 2021 Page views - 704,111

FOX Events and Networks

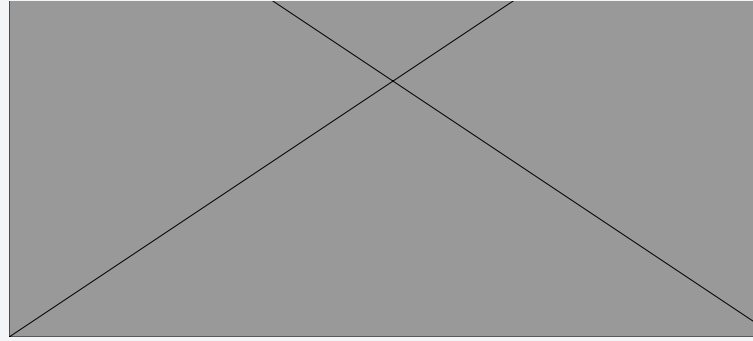
FOX events and topic-driven member networks offer unique opportunities to interact with the world's largest and most qualified family office audience. The programs feature world-class speakers and provide ample opportunity for networking and peer exchange with fellow top minds in the family office world. Our signature event, The FOX Family Forum, brings together all our audiences to one place where they can meet, connect, and engage on topics affecting the industry.

Forums/Symposiums/Summits

FOX forums are the premier industry gatherings in the family office space, offered in-person, virtually, and in hybrid format. Each year, we host several forums targeted at several topics and audiences, including global investments, family office operations, multi-generational families, and wealth advisors. FOX forums are also an excellent opportunity to network with FOX members, engage in peer dialogue and social activities, and become better acquainted with and integrated into the FOX community.

Workshops

FOX offers workshops open to members and qualified non-members on a wide variety of specialized and technical topics, such as Private Trust Companies, Family Office Design, Enterprise Families, Direct Investing, and UHNW Advisor Training. These workshops occur virtually or in person.



Networks

FOX operates eight member networks focused on the current special interests of our members. Our networks represent an effective way for members to stay updated on the issues and skills that apply to crucial family office disciplines. Each network focuses on one discipline or member subset, making it easy to tap into knowledge and advice from fellow FOX members, industry experts, and FOX research. A FOX subject matter expert leads each network.

- Direct Investing Network
- Family Learning Network
- Human Capital Network
- Legal Counsel Network
- Private Trust Company Network
- Rising Gen Network
- Technology Operations & Data Security Network

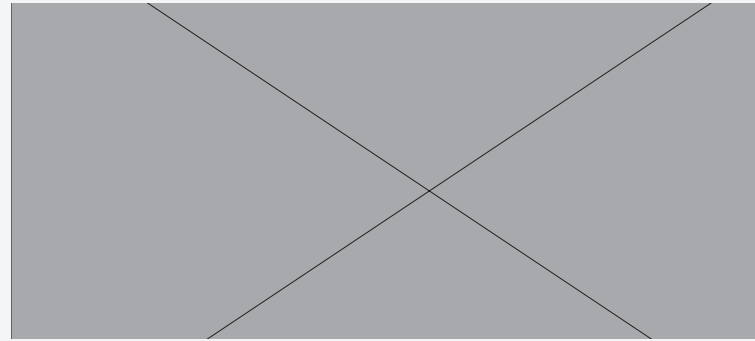
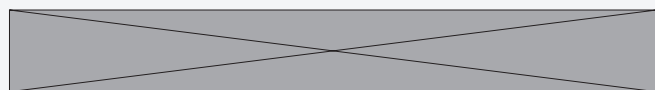
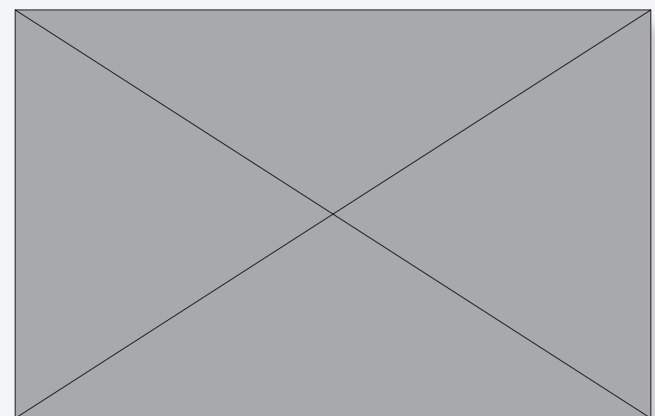
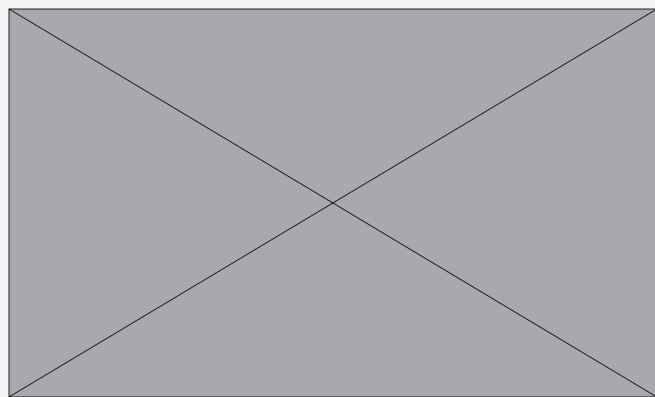
Forum Attendees:

- 2020 Forum Attendees - 1088
- 2021 Forum Attendees - 1080

FOX Events and Networks

Videos and Podcast

Showcase your thought leaders in front of our engaged audience with FOX's produced/edited video interviews and podcasts, or provide your own approved, pre-produced video content. All videos are posted to your dedicated page FOX website (and yours if you'd like). Podcasts are posted to the FOXCast channel and are available on Apple Music, Spotify, etc. Video and podcast content promotion appears as featured content in our newsletter (FOXConnects) and is distributed to our audience with specialized email promotion when appropriate.



FOXConnects Newsletters

FOX's bi-monthly digital newsletter targeted to both our member and subscriber communities. This communication get distributed to over 19,000 contacts per issue.

Social Media

LinkedIn 16,000+ followers—LinkedIn delivers an average of 10,000 impressions monthly. Our social media team promotes thought leaders to target and engage social media audiences in areas such as Direct Investing, Family Learning, Human Capital, Investment, Legal Counsel, Private Trust Company, Rising Gen, Technology Operations & Data Security, Family Governance, and more.

Digital Advertising on the FOX website

(Coming Soon)

FOX Website - familyoffice.com

ROS Leaderboard - (728x90 pixels)

ROS Medium Rectangle - (300x250 pixels)

Website Super Leaderboard - (970x90 pixels)

FOX Website Annual Unique Visitors:

- 2020 New Users - 130,556
- 2021 New Users - 168,836

FOX Official Marketing Partnership Program

	PREMIER	EXECUTIVE	CLASSIC
An introductory meeting with our team of Relationship Managers	✓	✓	✓
Partnership announcement via LinkedIn with logo inclusion	✓	✓	✓
Dedicated Official Marketing Partner Webpage	✓	✓	✓
Educational Video	✓	✓	✓
FOX Event Sponsor (Executive Exhibiting Sponsor)	2 In-person attendees; 4 virtual	2 In-person attendees; 3 virtual	2 In-person attendees; 3 virtual
	<ul style="list-style-type: none"> • Logo recognition on event page, portal and related communications • Pre-event logistics meeting with FOX team • 6 ft table with 2 chairs, power and signage 	<ul style="list-style-type: none"> • Logo recognition on event page, portal and related communications • Pre-event logistics meeting with FOX team • 6 ft table with 2 chairs, power and signage 	<ul style="list-style-type: none"> • Logo recognition on event page, portal and related communications • Pre-event logistics meeting with FOX team • 6 ft table with 2 chairs, power and signage
	All Forums	2 Forums	1 Forum
	2 Events	1 Event	0 Events
Event Networking Sponsor (Not including FF)	<ul style="list-style-type: none"> • Reception • Lunch • Breakfast • Breaks 	<ul style="list-style-type: none"> • Reception • Lunch • Breakfast • Breaks 	N/A
Introduce a session at a select Forum	✓	✓	
Roundtable Opportunity with a select council	✓		
Choose from the following digital assets	(Choose 4) <ul style="list-style-type: none"> • Podcasts • FOX Connects, email communications • Live Webcast (1) 	(Choose 3) <ul style="list-style-type: none"> • Podcasts • FOX Connects, email communications • Live Webcast (1) 	(Choose 3) <ul style="list-style-type: none"> • Podcasts • FOX Connects, email communications
Post content to the FOX blog monthly	✓	✓	✓
Website or newsletter advertising	✓	✓	
Limited access to a select FOX network	✓		

* All at the discretion of FOX

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