



# Technology Resource Partnership

Connect with leaders and decision-makers from the world's top families by becoming a *Family Office Exchange Technology Resource Partner* and joining our new community of technology vendors focused on the family office and wealth advisory spaces.



## About the FOX Technology Resource Partnership

As a FOX Technology Resource Partner, you will have the benefit of a year-long engagement with our global member community. You will also be an active participant in the annual FOX Technology Showcase, an industry-wide event.

Partnership requires review by the FOX team to determine if your organization is a solution that serves the family office industry.

### FOX Technology Resource Partners fall into four categories:

#### SOFTWARE PRODUCTS

Vendors who build or create technologies to be sold, licensed, or “rented” as a service.

*Software Applications • Platforms • SAAS • System Tools • Hardware*

#### OUTSOURCING

Vendors with teams of experts who perform the role of a back office, a portion of operations, or the IT / Technology planning.

*Backoffice • Portion of Operations • IT / Technology Planning • Software Specialists  
• Operations Specialists*

#### CONSULTING

Vendors who perform a project around technology for an organization.

*Software Selection • Implementation • Training • Documentation  
• Workflow Organization • Vendor Due Diligence • Cybersecurity Management*

#### DATA MANAGEMENT

Vendors who retrieve, deliver, and integrate data through tools, or programming.

*Manager Data • Custodian Data • Accounting & Tax Integration • Aggregated Reporting  
• Multi-platform Integration*

### ABOUT FOX FAMILY MEMBERS

**1000+**  
wealth owners from 338 families

**970**  
executives from 338 families

**70%**  
are led by G1 or G2

**\$550<sup>MM</sup>**  
median investable assets of members

**50%**  
are engaged in Direct Investing

**85%**  
have a family foundation



## FOX Technology Resource Partnership Benefits

### PREMIERE | TECHNOLOGY RESOURCE PARTNER

**\$50,000**

*Includes all the benefits of the Executive level plus:*

- One additional employee (4 total) can participate in the FOX Technology Showcase.
- One additional (4 total) FOX Technology Partner Blog Posts, written by you and linked to your page on the Technology Resource Partner section of the FOX website.
- Two additional (3 total) partner-created educational videos to be made available on the Technology Resource Partner section of the FOX website.
- Conduct a Roundtable at the FOX Virtual Premiere Partner Spring Technology Day (Apr. 2023).
- Conduct a Roundtable at (1) FOX Forum.
- Participate in (3) FOX Forums at the Executive Exhibiting Sponsor Level.

### EXECUTIVE | TECHNOLOGY RESOURCE PARTNER

**\$35,000**

*Includes all the benefits of the Classic level plus:*

Upgrade from introducing a session to participating in the FOX Technology Showcase as a subject matter expert, industry leader, and educator with forward thinking technology expertise as an individual presenter, moderator or as a panel member with other qualified technology experts. (Agenda assignments will be at the option of FOX and based on content topics and complete agenda.)

- One additional employee (3 total) can participate in the FOX Technology Showcase.
- Two additional (3 total) FOX Technology Partner Blog Posts, written by you and linked to your page on the Technology Resource Partner section of the FOX website.
- One partner-created educational video to be made available on the Technology Resource Partner section of the FOX website.
- Conduct a Roundtable at the FOX Technology Showcase.
- Conduct a Roundtable at (1) FOX Forum.
- Participate in (2) FOX Forums at the Executive Exhibiting Sponsor Level.

### CLASSIC | TECHNOLOGY RESOURCE PARTNER

**\$20,000**

*Provide FOX Technology Showcase demonstrations and presentations of your services and product/software to showcase attendees including an introduction, presentation of your services, product/software, and a Q&A session with attendees.\*\**

- Introduce a speaker or session (at FOX's choosing) during the FOX Technology Showcase.
- Two total employees can participate in the FOX Technology Showcase.
- Recording of your preferred FOX Technology Showcase demonstration placed on the Technology Resource Partner section of the FOX website.
- Conduct and moderate a Roundtable at the FOX Virtual Winter Technology Day (Jan/Feb 2023).
- A dedicated page on the Technology Resource Partner section of the FOX website.
- One FOX Technology Partner Blog Post, written by you and linked to your page on the Technology Resource Partner section of the FOX website.
- A dedicated page in the FOX Technology Showcase portal to share your firm's collateral.
- Logo recognition on the FOX Technology Showcase page, in the Showcase portal, in Showcase-related communications, in communications to FOX membership, and in the official Showcase recap, and mentions of your firm during the Showcase.
- A pre-event logistics meeting with the FOX team to understand how to maximize your time at the event.
- Participate in (1) FOX Forum at the Executive Exhibiting Sponsor Level.

	PREMIERE	EXECUTIVE	CLASSIC
	\$50,000	\$35,000	\$20,000
Provide FOX Technology Showcase demonstrations and presentations of your services and product/software to showcase attendees including an introduction, presentation of your services, product/software, and a Q&A session with attendees.**	✓	✓	✓
FOX Technology Showcase Program Agenda Participation.	Participate in a session as a subject matter expert	Participate in a session as a subject matter expert	Introduce a session or speaker
Your employees able to participate in the FOX Technology Showcase.	4	3	2
Roundtables	FOX Technology Showcase FOX Premiere Partner Day FOX Technology Day FOX Forums [1]	FOX Technology Showcase FOX Technology Day FOX Forums [1]	FOX Technology Day
Participation at the Executive Sponsor Level in other FOX Forums.	Select 3 Forums: Global Investment Forum Family Office / Wealth Advisor Forum Family Forum	Select 2 Forums: Global Investment Forum Family Office / Wealth Advisor Forum Family Office Forum Family Forum (\$10k Addt'l)	Select 1 Forum: Global Investment Forum Family Office / Wealth Advisor Forum Family Office Forum Family Forum (\$10k Addt'l)
Recognition and participation as a FOX Technology Operations and Data Security Network Sponsor.	✓	NA	NA
FOX Technology Partner Blog Posts, written by you and linked to your page on the Technology Resource Partner section of the FOX website.	4	3	1
Partner created educational videos placed on the Technology Resource Partner section of the FOX website.	3	1	NA
A dedicated page on the Technology Resource Partner section of the FOX website.	✓	✓	✓
Recording of your preferred showcase demonstration placed on the Technology Resource Partner section of the FOX website.	✓	✓	✓
A dedicated page in the FOX Technology Showcase portal to share your firm's collateral.	✓	✓	✓
Logo recognition on the FOX Technology Showcase page, in the Showcase portal, in Showcase-related communications, in communications to FOX membership, and in the official Showcase recap, and mentions of your firm during the Showcase.	✓	✓	✓



\*\*Product Demonstrations/Services Presentations may be in shared time slots - concurrent with other vendor demonstrations/services presentations. Example: 2021 event each qualified vendor presented 4 independent demo sessions, concurrent with other technology demonstrations. Content for sessions and media is subject to approval by FOX.

All FOX Technology events are open to all family and advisor members of Family Office Exchange. Qualified non-members of FOX can attend the FOX Technology Showcase. All other FOX Technology events, including user group roundtables, are limited to FOX family and advisor members.

FOX Technology Resource Partners are not permitted to attend live demonstrations of other partners. Please note that to protect our community's privacy, FOX does not provide participant lists or contact information.



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Family Office Exchange



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