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Family Office Exchange to Unveil Findings of Technology Survey at 2013 Financial Executives Forum

Event to highlight family office technology, security and tax planning issues

CHICAGO, June 18, 2013 – Family Office Exchange (FOX), a global membership organization of single family offices and their advisors, announced that they would present the findings of their new technology survey at the 2013 FOX Financial Executives Forum, July 17-18 in Chicago.

The forum is an annual event highlighting best practices and critical updates for family office executives. This year's agenda highlights issues related to technology, security and tax planning. FOX Senior Consultant Jane Flanagan will kick off the event with a presentation of the findings from the 2013 FOX Technology Survey.

"The study offers a much-needed look at current technology practices in the family office," says Flanagan. "From the use of cloud technology to the latest systems security practices and technology spending, this study is designed to provide attendees with the peer data they need to benchmark their current operations."

Oakbrook Solutions President Craig Cook and RockIT President Mark Rogozinski will follow the presentation with a discussion of how key technology trends and innovation impact family offices.

Other sessions include:

- A panel discussion on information security issues featuring AIG Property and Casualty Lead CyberEdge Specialist Christopher Liu, TriState Capital Bank President Chuck Fawcett, and personal security expert Tom Kasza of Hillard Heintze.
- HUB International Personal Insurance Vice-President Michael DuBose discussing business continuity in the wake of Hurricane Sandy.
- Attorneys Thomas W. Abendroth and Robert R. Pluth, Jr. of Schiff Hardin LLP detailing estate and income tax changes resulting from the American Taxpayer Relief Act of 2012.
- A legislative update from Policy and Taxation Group CEO Jeff Cook-McCormac.

The agenda for the forum is set by FOX's Financial Executive Council, a talented peer group of CFOs, controllers and tax managers who are dedicated to sharing best practices related to family office operations, compliance, and technical issues.

"The greatest value from this event comes from family office financial executives getting a chance to meet with their peers and share ideas," says FOX Relationship Manager Jo Wellman.

Registration for the 2013 FOX Financial Executives Forum is open to family office and multi-family office non-members, but limited seating is available. Additional information is available at <https://www.familyoffice.com/learning-events/forums/2013-fox-financial-executives-forum>.

About Family Office Exchange

Family Office Exchange supports a global member network of wealthy families and their advisors who are pursuing best practices for optimal management of their families' wealth and legacy. The community includes more than 450 organizations in 20 countries who utilize FOX's resources each year for advice, networking, education, and comparative metrics.

FOX is headquartered in Chicago and London, with offices in New York, Boston and Washington DC. For more information about FOX, call 1.312.327.1200 (The Americas) or 44.(0)20.7520.9443 (Europe, Africa, Asia/Pacific) or visit www.familyoffice.com.

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