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## **2013 FOX Fall Forum to Feature New Research on the State of Servicing the Family Office**

*Neuroscientist and author Tali Sharot to deliver keynote address on risk in decision making*

**Chicago, September 26, 2013** – Family Office Exchange (FOX), a global membership organization for single family offices and their advisors, today announced the agenda for the annual [FOX Fall Forum](#), to be held in Chicago October 28-30. The three-day event will feature a gap analysis comparing the delivery of industry services to the needs of complex multigenerational families.

The event will include a keynote from neuroscientist Tali Sharot on her book, *The Optimism Bias*, which details research suggesting our brains are hardwired to look on the bright side and how that can be both dangerous and beneficial.

The gap analysis study results from the work of the FOX Thought Leader Council detailing the key services required by the ultra-wealthy in today's private wealth management industry across a wide range of disciplines. These include investment, tax, estate and fiduciary planning, insurance, governance and philanthropy.

"Interestingly, the study revealed that there is not a services gap," says FOX Managing Director of Market and Content Development Amy Hart Clyne. "It is how rather than what services are delivered that is the greatest determinant of client satisfaction."

Additional highlights include:

- A new benchmarking report on family office compensation
- An in-depth discussion between FOX CEO Sara Hamilton and Dr. Dennis Jaffe, Ph.D., of his new study developed in cooperation with the membership organization on the common traits of successful multigenerational families.
- A session on empowering younger generation owners
- Examples of family leadership strategies
- A discussion of investment decision-making practices
- A look at how wealthy families are making an impact in their communities

“Family enterprises are a complex system of interdependent relationships, and every decision has the potential to ripple across the family, their investments, their philanthropy, their businesses and ultimately their family legacy,” says Sara Hamilton, FOX founder and author of a new whitepaper on this topic. “This year’s event looks at the choices facing families of great wealth and highlights the stories of families who’ve successfully transferred wealth across multiple generations.”

Registration for the event is open to qualified non-members, but limited seating is available. The first day of the event is reserved exclusively for wealth owners and family office executive members. Additional information is available at <https://www.familyoffice.com/learning-events/forums/2013-fox-fall-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 over 6,000 people from 450 organizations in 20 countries who utilize FOX’s resources each year for advice, networking, education, and comparative metrics.

FOX is headquartered in Chicago, with offices in New York and London. 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](http://www.familyoffice.com).

### **About the FOX Thought Leaders Council**

The FOX Thought Leaders Council is a diversified working group of advisors, including integrated wealth advisors, insurance providers, private banks, trust companies, and educators working with experts in estate planning, tax, and philanthropy. Each year, the council works with a group of FOX members to identify the key industry issues.