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Family Office Exchange Offers Preview of University of Chicago Private Wealth Management Course

Free Webinar Scheduled for September 29 at 10 a.m. CDT

CHICAGO, September 22, 2010 – Family Office Exchange (FOX) will present a rare public webcast on Wednesday, September 29, at 10 a.m. Central time/11 a.m. Eastern time to preview a unique family educational opportunity, ***Private Wealth Management for High Net Worth Individuals and Families***, which next takes place November 2-5 at the University of Chicago Booth School of Business.

Providing the introduction will be Stuart Lucas, co-designer of the course and Chairman, Wealth Strategist Partners, and Sara Hamilton, course instructor and Founder and CEO, Family Office Exchange.

Provocatively entitled "Are You Prepared for Another Decade of Zero Growth?" the presentation will demonstrate how the four-day course can prepare families to set goals, spending strategies, investment strategies, advisor selection, and estate plans in order to cope with the uncertainty created by the current economy. It also will provide an excellent opportunity to introduce next generation family members and new family office personnel to the comprehensive planning that goes into managing family wealth and legacy.

To register for the free webinar, visit www.foxexchange.com/pwm/.

About the Course

The program helps wealth owners grow and protect their financial capital while reinforcing personal values that support flourishing families. Equipping participants with the frameworks, tools and techniques necessary for building and executing a comprehensive wealth management plan, the program integrates sessions on investing, selecting advisors, cash flow management, tax and estate planning, family legacy planning, and philanthropy into a coherent whole.

The acclaimed faculty has a strong combination of academic knowledge and practical experience to share in a dynamic classroom environment.

"Successful wealth management involves the integrated and effective management of all these components," says Steven Kaplan, Neubauer Family Professor of Entrepreneurship and Finance. "From the feedback we've received, participants find the course valuable, plus they enjoy the classroom experience. They also appreciate the confidential environment and ample opportunity they get to network with fellow wealth owners challenged with similar issues."

"The typical participant has a substantial net worth and may own or have sold a family business," says John Heaton, Joseph L. Gidwitz Professor of Finance. We regularly receive participants from around the world as well as multiple generations of the same family."

"Today's wealth management industry is complex and ever changing and so are family dynamics," says Sara Hamilton, Founder and CEO of Family Office Exchange. "This program will provide participants with the tools and techniques to make sound decisions that are closely aligned with their values, skills, interests, risk tolerance, and family dynamics."

“Managing wealth effectively is every bit as hard as creating it in the first place,” says Stuart Lucas, CFA, author of the critically acclaimed book *Wealth* and fourth-generation steward of his family’s fortune. “With the tools they gain in this program, wealth owners can more effectively take charge of their wealth, while delegating the details with greater confidence.”

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About Family Office Exchange

Family Office Exchange (FOX) is a definitive source of knowledge and best practices associated with the business of managing family wealth. The strength of the FOX network is derived from the collective knowledge and experience of more than 500 wealthy families and their advisors, who rely on FOX for education and advice about family and financial transitions. For more information about FOX, call 312.327.1200 (Chicago office) or +44 (0) 20 7170 4235 (London office) or visit www.familyoffice.com.

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