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How Family Offices Need to Respond to New Financial Reform Regulations

Special Workshop Examines Impact on Families and Their Options

CHICAGO, September 28, 2010 – Family Office Exchange (FOX) today announced a workshop developed exclusively for wealthy individuals and executives of single-family offices who are interested in exploring structural options for private wealth management.

Uncertainty regarding financial regulatory reform, particularly the Securities and Exchange Commission definition of “family office” under a provision of the Hedge Fund Transparency Act, has prompted many wealthy individuals and family office executives to re-evaluate their current office structure and consider other, more formal options that could better serve their needs in a post-reform world.

“The changing legal and regulatory environment makes it critical to identify the right structure for the future,” says Mariann Mihailidis, FOX’s managing director, councils. “Many wealthy individuals and family office executives have considered becoming a private trust company or a registered investment advisor but are unsure of what is involved in establishing and maintaining these structures or how to make the best choice for their particular situation.”

“Is Regulation in Your Future? Structural Options for Private Wealth Management,” scheduled for November 10-11 at The Peninsula Chicago, provides direction to those responsible for managing and protecting family wealth who feel they are the crossroads of uncertainty yet are anxious to move ahead.

Participants in this unique workshop will meet with, and hear from, leading advisors and other family office executives who will share their firsthand experience and provide knowledge for evaluating different structural options. Among the notables are John P.C. Duncan and Martin Lybecker, both highly respected attorneys regarded as expert on the subject of financial regulatory reform and what it means for wealthy individuals and families.

“This newly created program is an essential due diligence tool for any wealth owner or office executive who is exploring structural options to optimize the efficiencies of their operations while ensuring compliance with various regulatory authorities,” Mihailidis says.

Registration for “Is Regulation in Your Future? Structural Options for Private Wealth Management” is available at www.foxexchange.com/ptc. This event is limited to wealthy individuals, executives of single-family offices and qualified multi-family offices. For information, email events@familyoffice.com.

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. Founded in 1989, FOX provides industry knowledge and wealth owner education to more than 500 members in 22 countries from offices in Chicago and London. For more information, visit www.familyoffice.com.

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