



Media contact  
**Marvin Pollack**  
[press@familyoffice.com](mailto:press@familyoffice.com)  
312-327-1200

## **FOX Expands Educational Offerings for Family Wealth Market**

*New Workshops Focus on Family Office Sustainability Plans, Trustee-Beneficiary Responsibilities*

**CHICAGO, April 27, 2011** – Family Office Exchange (FOX), a leading provider of research, education, and networking support to the family wealth market, today announced two new workshops that are open to wealth owners and family office executives. Membership in FOX is not required for participation in these workshops.

Known for addressing challenges unique to the family wealth market, FOX has developed a workshop format that brings together family members and family office executives with new FOX research and some key industry experts to address pressing issues in a focused working environment.

“This educational approach is working well for our members,” says Sara Hamilton, founder and CEO of FOX. “They get new information and insights in an intimate meeting of peers where they can work through the application of the concepts to their own situation. Attendees go home with a plan well underway. Given our desire to contribute to the advancement of family office best practices and the very positive feedback we have had to date, we are opening our next set of workshops to qualified wealth owners and family office executives who are not yet FOX members.”

The new FOX workshops address issues of particular concern to wealth owners and family office executives: creation of practical plans for sustaining the family office and the role of trusts in the wealth transfer process and what it means to be a trustee.

**“Sustaining Your Small Family Office Part II: Essential Tools for Long-Term Success,”** scheduled for May 31 through June 1 in Chicago, is designed specifically for wealth owners and leaders of small family offices who recognize the value of their family office and want to know how to develop an action plan for addressing the risks they are facing from managing costs and new regulatory requirements.

Presented in partnership with FOX member Okabena Company, this solutions-oriented workshop combines FOX proprietary research on risk and measuring value with a case study of how one family office is addressing its sustainability challenges.

**“A New Look at the Roles and Responsibilities of Grantors, Trustees, and Beneficiaries,”** scheduled for June 15-16 in New York, examines what it really means to be a trustee. Trusts are heavily used by most families of wealth. This workshop is intended to help grantors in selecting trustees. They will understand

the skills and experience needed in a trustee, appreciate the responsibility and liability placed on the trustee, and anticipate the needs for trustee selection in succeeding generations. This discussion will also help trustees, trustee candidates, and beneficiaries understand their roles as well.

Presented in partnership with FOX strategic advisor member Fiduciary Trust Company International and sponsored by Chartis and Frank Crystal & Company, this workshop looks at the role of trustee from multiple perspectives and shows trustees and beneficiaries how they can work together more effectively.

For more information about the two workshops, visit [www.familyoffice.com/workshops](http://www.familyoffice.com/workshops).

### **About Family Office Exchange**

Family Office Exchange (FOX) is a global membership organization dedicated to supporting high net worth families and their advisors with research studies, consulting services, collaboration opportunities, and education on key topics such as managing wealth, family governance and best practices for running family offices. FOX currently serves 500 families and their advisors from headquarters in Chicago and London with managers in New York, Boston, and Washington. For more information about FOX, call 312.327.1200 (Chicago office) or +44 20 7170 4235 (London office) or visit [www.familyoffice.com](http://www.familyoffice.com).

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