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FOX Certifies List of Leading Wealth Advisors

*Firms selected for their ability to deliver integrated wealth advice to private investors
with more than \$20 million in assets*

CHICAGO, June 6, 2012 – Family Office Exchange (FOX), a global counselor on matters of managing family wealth, today announced the publication of the FOX Directory of Leading Wealth Advisors. The directory identifies firms that have passed a rigorous screening to verify their ability to deliver integrated wealth advice to families with more than \$20 million in investable assets. The full list is available on at www.leadingwealthadvisors.com, part of the new, publicly accessible [FOX Wealth Center](#) website.

Background of the Directory

When a family's investable holdings exceed \$20 million, they need more sophisticated financial strategies than those offered by a traditional investment manager. At this wealth level, the creator of the wealth realizes that they have more money than they will spend in their lifetime and need to engage advisors on asset allocation, wealth transfer, tax planning, and philanthropy as well as financial education for their children. Once assembled, these advisors need to talk and work together to provide effective, integrated results.

Whereas 20 years ago building a coordinated network of resources meant establishing a private family office, a new class of advisors has arisen that provides these integrated services in a comprehensive manner. In order to help private investors recognize such advisors, FOX has identified them *Leading Wealth Advisors* and provided visibility through the [FOX Directory of Leading Wealth Advisors](#) .

Selection Criteria

Leading Wealth Advisor firms make it possible for an investor to get family office-type integrated wealth management without personally building a team of advisors and coordinating the work of the advisors.

The firms in the FOX Directory of Leading Wealth Advisors are qualified based on 10 criteria and measured by 33 metrics derived from years of FOX research and consulting experience. The screening verifies that the firms possess the financial strength, management experience, business model and

resources to provide a full range of integrated wealth advice including investment management, tax planning, estate planning, philanthropy and owner education to families. The list of criteria is available at www.leadingwealthadvisors.com/criteria.

Screening Continues

“This initial list of 30 Leading Wealth Advisor firms is just the beginning,” commented Sara Hamilton, Founder and CEO of Family Office Exchange. “We began the formal screening process last year and know that there are many more qualified firms to consider. Firms interested in being included in the list can inquire about the screening process through the website.”

Firms in the directory have been invited to create four-page profiles to communicate their value proposition and the culture of their firm. The profiles include an overview of the firm, key statistics about their business, responses to up to 12 interview questions, and a resource section for posting of articles, videos, and marketing materials. The functionality of the directory also allows users to compare up to three firms side-by-side.

“On the website, we surround the directory with a number of new educational materials to help investors understand their true needs and to appreciate the benefits of integrated wealth support,” continued Ms. Hamilton. “The materials and the directory provide a framework for selecting a wealth advisor and help the family more easily distinguish one advisor from another.”

Among the resources accompanying the directory are a new white paper called “[Navigating the Wealth Management Landscape](#),” which is offered for free. The website also contains a handy tool for evaluating current advisors and an interview questionnaire for families to use as a guide when meeting potential new advisors.

Access to the extended directory listings and all of the accompanying materials is free to those who register for the [free FOX Public Network](#).

About Family Office Exchange

Family Office Exchange operates a global community of private investors and wealthy families who are pursuing best practices for optimal management of their families’ wealth and legacy. The community includes over 6,000 people from 650 organizations in 20 countries who utilize FOX’s resources for advice, networking, education, and comparative metrics each year.

FOX provides strategic advisory services as well as a variety of membership options supporting families of differing experience levels – from private investors with virtual offices, those just setting up their family office, as well as business owners and multi-generational families with sophisticated, well-established offices.

Also, FOX supports an extended network of public members who can access FOX directories and FOX’s Knowledge Center with content on integrated wealth management, family office best practices, and

family governance and legacy. Public members can purchase studies, participate in surveys, and attend open educational events.

FOX is headquartered in Chicago and London, with offices in New York and Boston. 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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