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FOX Master Class Prepares Advisors to Attract and Serve Complex, Ultra-Wealthy Clients

Course examines needs and expectations of ultra-high-net-worth families

Chicago, June 29, 2012 – Family Office Exchange (FOX), a global organization that advises the family wealth market, announced a new course aimed at meeting the growing demand among wealth advisors for best practices in serving ultra-high-net-worth families.

The [FOX Wealth Advisor Master Class](#) will be held September 12-14 in New York and is recommended for firms interested in strengthening their delivery of the kinds of integrated services most in demand from wealth owners.

The course draws on extensive research and case studies identified by FOX during its more than 22 years of supporting wealthy families and their advisors to cover:

- The unique challenges of top-tier wealth owners
- Developing an integrated service delivery model
- Business strategy and process management
- Sales and marketing strategies
- Talent and team structures
- Pricing and profitability

“Many advisors want to serve the ultra-high-net-worth market,” says FOX Founder and CEO [Sara Hamilton](#). “This course is designed to help sophisticated advisors raise their practice to best in class. It will be useful for firm principals as they continue to build their businesses. It will also serve as excellent training for a firm’s client representatives in that it prepares them to better attract and serve this elite clientele.”

“The program will not only cover best practices but important business considerations such as marketing strategies, process management and how to assemble the right talent for your team,” says FOX Senior Consultant Charles Grace.

FOX membership is not required to attend the class, although FOX members do enjoy a discounted rate. Seating is limited to assure an optimum learning experience. Additional information is available at <https://www.familyoffice.com/learning-events/workshops/wealth-advisor-master-class>.

About Family Office Exchange

[Family Office Exchange](#) supports 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 to those just setting up their family office to 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.