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FOX Wealth Advisor Forum to Highlight Client Trends, Next Generation Talent and Industry Benchmarks

Keynote speakers Howard Bragman and Dan Schawbel to discuss branding and the next generation of clients

Chicago, March 21, 2012 – Family Office Exchange (FOX), a global membership organization of single family offices and their advisors, announced the agenda for the annual Wealth Advisor Forum, to be held May 1-2 in Coral Gables, Florida. The two-day event will feature the outlook for private business owners and other wealth owners over the next decade, strategies to address the coming shortage of advisor talent and industry benchmarks.

Howard Bragman, author of *Where's My Fifteen Minutes?: Get Your Company, Your Cause, or Yourself the Recognition You Deserve*, will deliver a keynote on how to build your corporate brand in today's media environment. Millennial Branding Managing Partner Dan Schawbel, author of *Me 2.0: 4 Steps to Building Your Future*, will discuss future challenge of servicing the next generation of wealthy clients and what firms need to do to meet those needs.

Other sessions include:

- WealthX President David Friedman on the importance of private capital in global economics.
- A panel on developing the next generation of wealth advisors featuring Hawthorn PNC Executive Vice President Thomas P. Melcher, Ascent Private Capital President of Ultra High Net Worth Michael Cole, and Pitcairn CEO Leslie Voth.
- FOX CEO Sara Hamilton discussing the key trends and industry issues affecting private business owners in the next decade.
- FOX President Alexandre Monnier leading a panel discussion on the challenges of private business owners featuring Wealth Enterprises CEO Maria Elena Lagomasino and FTI Senior Managing Director Mark Rubin.

"The focus of this year's event is what a best-in-class advisor needs to know to provide quality service to ultra-high-net-worth clients, both today and into the future," says Monnier.

“The agenda is designed to provide attendees with a better understanding of what the client of the future will look like and the business processes and talent needed to meet their needs,” adds Hamilton.

Registration for the event is open to members and non-members, but limited seating is available. Firms are encouraged to bring their next generation of talent to the event. Additional attendees receive \$250 off admission. Attendees are encouraged to join FOX for golf at the Biltmore Golf course on April 30 at 12:00 pm followed by an evening reception. Additional information is available at <https://www.familyoffice.com/learning-events/forums/2013-fox-wealth-advisor-forum>.

About Family Office Exchange

[Family Office Exchange](#) supports a global member network of wealthy families and their advisors 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 each year for advice, networking, education, and comparative metrics.

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.