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## **Family Office Exchange to Offer One-of-a-Kind Workshop on Family Office Design and Best Practices**

*Program geared to meet industry demand for formalized training*

**Chicago, April 4, 2013** – Family Office Exchange (FOX), a global membership organization of single family offices and their advisors, announced a new workshop on designing an effective family office. The event will be held May 13-14 in Chicago and covers best practices collected from more than 400 consulting projects and 24 years of benchmarking the operations of family enterprises.

The day and a half program will guide attendees through the FOX Family Office Blueprint™. Similar to an architectural design, the Family Office Blueprint is a detailed sequence of steps used to customize a family office to a particular family situation. The agenda will cover:

- Setting the long-term vision for your office with a practical plan for execution
- Defining a family office's scope of services and delivery methods
- Establishing investment guidelines and processes
- Operations, governance and cost allocation (including a special presentation on risk delivered in conjunction with event sponsor AIG)
- Building an effective technology solution

"We're offering this workshop because we've found that there is very little formalized training available in the marketplace on how to operate a successful family office," says FOX Managing Director Karen Neal. "Family offices are rarely fortunate enough to hire people with previous family office experience, so many of these professionals can use training on everything from governance to setting the right investment policy to establishing an effective compensation plan."

"We recommend family members also attend, so they have a better understanding of what they've created and how to measure the value of their family office," adds Neal.

FOX membership is not required to attend the class, although 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/family-office-design-best-practices-workshop>.

**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 enterprise. 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, Boston and Washington.

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](http://www.familyoffice.com).