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Family Office Exchange Introduces Wealth Advisor Council in Europe

Peer Group to focus on elevating advice offered to high net worth families

London, September 5, 2013 – Family Office Exchange (FOX), a global network of wealth owners and their advisors, today announced the formation of a new Council group for sophisticated wealth advisors in Europe. The Wealth Advisor Council will provide advisors with a private peer group, supported by FOX research, to help guide their future growth as advisors to the high net worth market.

The inaugural meeting of the FOX Wealth Advisor Council is scheduled to take place in London on Thursday, September 26, 2013.

“This offering is patterned after a similar Council that has been operating in the United States since 2006,” notes Alexandre Monnier, president of FOX. “Many of the debates and insights arising from the Council have helped shape the emergence of a new wealth advisor class dedicated to serving the most sophisticated, multigenerational families.”

“Over the last 20 years, a group of American advisors has taken advantage of the opportunity to specifically address the unique needs of the wealthiest families,” adds Sara Hamilton, Founder and CEO of Family Office Exchange. “The requirements of these families are substantially different from the needs of other wealthy families. A new segment of advisor has successfully emerged to serve them, fostered by the collaboration in the FOX Council.

“As their wealth grows, a financially successful family requires more than traditional investment managers and private bankers typically provide. There is a need for enhanced services in order to add business among this desirable segment. Based on demand from our European advisor members, we believe now is the time to support the expansion of this segment in Europe.”

Among the FOX resources available to this group are insights from advisor benchmarking studies, including trends documented back to the mid-1990’s. They will also have access to the FOX Wealth Advisor Enterprise Series of studies that delve into the key strategic pillars of building a successful wealth advisory business, including product definition, pricing, staffing, service delivery, marketing, and business development.

“Any investment advisor or private bank currently operating in this space or aspiring to grow into it are welcome to apply for membership in this Council,” offered Christian Sulger-Büel, Director for FOX International, based in London.

The Wealth Advisor Council is currently in formation and will have its inaugural meeting on September 26 in London. Interested advisors should contact FOX at 44-20-7520-9439 or globalinfo@familyoffice.com.

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 more than 450 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 DC. 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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