



Media contact
Marvin Pollack
press@familyoffice.com
312-327-1200

FOX Wealth Advisor Forum to Highlight Building Sustainable Sales and Service Models for Ultra-Wealthy Clients

Agenda examines what it means to be an optimal advisor

Chicago, March 6, 2014 – Family Office Exchange (FOX), a global membership organization of wealthy families, single family offices and their advisors, announced the agenda for the 2014 Wealth Advisor Forum to be held in Chicago, April 24-25. The two-day event will look at the evolving needs of wealthy families and how to build and sustain an advisory practice that matches sales promise with service excellence.

Wilmington Trust Senior Managing Director Tom Rogerson will present a keynote on narrowing the gap between sales promise and service delivery and how to provide truly integrated family wealth management. Organizational consultant and clinical psychologist Dr. Gustavo Grodnitzky will lead a forward looking discussion on the five key cultural factors that engage and retain Millennial employees.

Additional sessions will look at:

- The 10 trends driving family/advisor alignment
- How to build a referral culture in your practice
- Preparing for the client of the future

“Ultra-wealthy families have become more sophisticated and more critical consumers of advisor services,” says FOX Founder Sara Hamilton. “This year’s forum is designed to help attendees understand the evolving needs of wealth owners and the business processes and talent needed to meet them.”

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. Additional attendees receive \$250 off admission.

Attendees are also encouraged to join FOX for the Michael Brink Memorial Golf Outing on April 23 at the Glen Club in Glenview, Ill. Additional information is available at <https://www.familyoffice.com/learning-events/forums/2014-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' enterprise wealth and legacy. The community includes over 8,000 people from 760 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 an office in New York. 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.