



Media Contact
Marvin Pollack
press@familyoffice.com
312.327.1200

**FOX Wealth Advisor Forum™ to Examine the Role of Advisor
as Master Builder of the Integrated Wealth Plan**

Highlights the importance of creating and leading collaborative and cooperative advisor teams

Chicago, February 11, 2015 – Family Office Exchange (FOX), a global membership organization of private family enterprises and their key advisors, has announced the agenda for its 2015 Wealth Advisor Forum™ to be held at the Biltmore in Coral Gables, FL, April 27-29. The event will demonstrate how the family's key advisor serves as the architect and integrator for the advisor ecosystem, and how advisors can contribute meaningfully toward solutions for families by embracing the mindset of a master builder. Advisors that work in a mindful and complementary way with other advisors to create the integrated wealth plan serve their clients more effectively.

This year's Wealth Advisor Forum will reveal new FOX insights on what families say they want and need from their advisors and will document the critical factors for building an integrated wealth plan.

Speakers will include NYU's Ben Dattner, Ph.D., who will speak about creating and managing the goals of a multi-functional advisor team, and Yale lecturer Sarah Biggerstaff, who will address how advisors can develop their own personal leadership brand. They will be joined by FOX experts Alexandre Monnier, President, and Amy Hart Clyne, Executive Director of the Knowledge Center.

"To build a successful integrated wealth plan, advisors need to collaborate and cooperate as a fine-tuned team. They cannot afford to think of themselves in an isolated way, or the family will suffer," says FOX President Alexandre Monnier. "This event will help advisors understand how to achieve successful multi-functional collaboration, and give them the tools, skills and techniques necessary to meet client expectations and build family sustainability."

Registration for the event is open to FOX members and non-members, but seating is limited. Firms are encouraged to bring their next generation of talent, so additional attendees receive \$250 off admission.

Attendees are also encouraged to join FOX for the Michael Brink Memorial Golf Outing on April 27 at the Biltmore Golf Course. Information is available at <https://www.familyoffice.com/learning-events/forums/2015-wealth-advisor-forum>.

About Family Office Exchange

Family Office Exchange (FOX) is the premier global member network for enterprise families and their advisors who are pursuing best practices for managing their family enterprise and sustaining their family wealth. The community includes over 8,000 sophisticated family leaders and advisors from 460 organizations in 20 countries who utilize FOX's resources each year for advice, networking, education, and comparative metrics.

FOX is headquartered in Chicago with offices in New York, San Diego and London. 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.