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## **The 2018 FOX Spring Global Investment Forum to Address Investing in a Time of Disruption**

*Semi-annual Forum for private investors takes place in San Francisco on March 13*

**CHICAGO, January 31, 2018** – Family Office Exchange (FOX), a global learning and networking community of family offices, private investors and key advisors, announces that the 2018 FOX Spring Global Investor Forum will be held in San Francisco on March 13 at The Ritz-Carlton Hotel. This event brings together the most sophisticated investors of private capital from across the FOX Community.

“The theme of the Forum is ‘Investing in a Time of Disruption,’” says Kristi Kuechler, President of the FOX Private Investor Center. “Investors are assessing a number of significant challenges—that feel more secular than cyclical. How will a potential convergence of global interest rate increases impact both bond and equity markets? How will accelerating automation affect the labor force, the economy, and the broader society? As families look to take advantage of these disruptions, we will discuss potentially transformative investment opportunities—through venture capital, public markets, and direct investments in private businesses.

Attendees will hear from the experts FOX has assembled to offer useful responses to these disruptive themes and learn from the other sophisticated investors at the meeting.

Highlights of the program include:

- **Positioning Your Portfolio in the Midst of Disruption** – Jeff Sherman, Deputy Chief Investment Officer at DoubleLine leads a discussion about the potential implications of tightening monetary policy on fixed income and equity markets, particularly given current high equity valuations.
- **The Forces of Automation and the Future of the Labor Force** – Michael Chui, Partner at McKinsey Global Institute presents findings on how accelerating automation is likely to affect the global labor force—and discusses the extraordinary societal ramifications that may result.
- **The Next Wave of Innovation** – A panel discussion, moderated by Jim Marshall, Head of the Emerging Manager Practice for Silicon Valley Bank, addresses the opportunities that disruption brings. The panelists, all venture capital managers, will each highlight a portfolio company and its founder.
- **Families Investing Directly: Lessons Learned** – Irene Mello, Director of the FOX Direct Investing Network leads a panel of direct investors sharing how they found

interesting companies to invest in, the successes and challenges of co-investing with other families, and other experiences.

The Forum agenda includes a combination of keynote presentations, specific-topic breakout sessions, and several opportunities to meet informally with other sophisticated investors over lunch, cocktails, and in moderated peer dialogue discussions.

For more information on the 2018 FOX Spring Global Investment Forum, please visit <https://www.familyoffice.com/SGIF>

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