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## **FOX Releases New Study on How to Create Memorable Family Client Experiences**

*FOX Applies Research on 30 Successful Brands to the Family Office Environment*

**Chicago, March 22, 2016** – Family Office Exchange (FOX), a global membership organization of enterprise families and their key advisors, has released its 2015-16 FOX Thought Leaders Council Report, **“Creating Memorable Client Experiences: Differentiation in the Ultra-Wealth Market.”**

Constructing memorable client experiences has become essential for both single and multi-family offices as well as other advisors to ultra-wealthy family clients. The goal is to delight the client—in this case, ultra-wealthy family members—by creating memorable moments, ultimately resulting in a deeper client relationship.

“This report will serve as a valuable guide for everyone working with families of wealth that desire to be indispensable to their clients,” says FOX Director of Advisor Research David Toth. “For advisors who seek to be the first person a family member calls, creating great client experiences will help them earn that privilege.”

Insights from “Creating Memorable Client Experiences: Differentiation in the Ultra-Wealth Market” include:

- Why it is important to deliver on a great client experience
- What we can learn from “Great Experience Brands” about producing memorable experiences
- How our framework of best practices can help families and/or firms think through their own, unique client experience
- Which activation strategies can help you start or re-energize client experience efforts, with tips on how to get going and tools for leadership teams

The report is the culmination of a yearlong research effort that began at the 2015 FOX Thought Leaders Council Summit, an annual meeting where the family office industry’s top advisors work collaboratively to address strategic issues impacting families.

“In collaboration with the FOX Thoughts Leaders Council, FOX develops cutting-edge insights on issues of critical importance to families, family offices and the advisors who serve them.”

says Toth. “Together, we deepen our understanding of the challenges they face while offering sound strategies that will serve them well now and in the future.”

“Creating Memorable Client Experiences: Differentiation in the Ultra-Wealth Market” is an included benefit for all FOX members. The FOX Thought Leaders Council includes: AIG, Ascent Private Capital Management, Asset Consulting Group, Inc., BNY Mellon, CAIS, CTC | myCFO, Deutsche Asset & Wealth Management, Eton Advisors, L.P., Family Wealth Advisors / BNP Paribas Group, HUB International Personal Insurance, Pitcairn, Plante Moran, PwC Private Company Services, Rockefeller & Co., Schiff Hardin LLP, SEI, U.S. Trust Family Office, Warner Norcross & Judd LLP, and The Wellspring Group.

### **About Family Office Exchange**

To learn more about Family Office Exchange (FOX), please email us at [info@familyoffice.com](mailto:info@familyoffice.com) or visit [www.familyoffice.com/media-kit](http://www.familyoffice.com/media-kit).