



Media contact
Marvin Pollack
press@familyoffice.com
1-312-327-1200

FOX Announces Workshop on Creating and Elevating a Private Family Trust Company

Workshop to feature critical regulatory updates and the latest thinking on establishing, operating, and maximizing the potential of a private family trust company

CHICAGO, December 6, 2017 – Family Office Exchange (FOX), a global membership community of enterprise families and their key advisors, will be offering a 2018 FOX Private Family Trust Company Workshop on February 21-22 in Ft. Lauderdale Beach. This workshop will provide updates on how private family trust companies (PFTCs) can be used as smart, durable solutions for managing increasing complexity within family enterprises.

The workshop, entitled *Elevating the Benefits of the PFTC to a Higher Calling* will focus on the ways a PFTC can help develop beneficiaries and provide an adaptive governance structure for family assets. PFTC Executives and industry veterans will describe how families and executives are achieving the highest calling of the PFTC to build stronger, sustainable families. They will also discuss industry risks on the horizon and calls to action.

“Families with PFTCs or those considering creating one come to this workshop to learn from leading experts and from each other. There is a strong sense of community among the families that attend because this is the only place where it is possible to meet exclusively with others who are governing or operating PFTCs,” says Ruth Easterling, Managing Director of Member Services at FOX and PFTC Workshop leader. “The last time FOX offered the PFTC workshop in 2016, it completely sold out.”

Session highlights include:

- **The Highest and Best Use of the PFTC** – Sara Hamilton, Founder & CEO of FOX, will discuss the roles the PFTC might play in support of the family and the family enterprise, along with how to ensure that strategic planning is done across the enterprise.
- **A Family Case Study: The PFTC** – A presentation about the evolution of the Houghton Family’s PFTC by Marianne Young, President of Market Street Trust Company, will feature a candid conversation about aligning the family’s values to the services provided, adapting service strategies as the family generations evolve, and keeping the PFTC relevant as the hub of the family enterprise.
- **PFTCs that Preserve Family and Preserve Trust** – The highest calling of the PFTC—or any trustee—is to develop flourishing beneficiaries. Hartley Goldstone, Research

Fellow for Wise Counsel Research, identifies the risks when this calling is ignored, and the challenges faced in establishing healthy trustee and beneficiary relationships.

- **PFTCs at Risk: A Call to Maintain Standards** – A panel of industry experts will share insights on how PFTCs using unsound practices are putting the entire industry at risk. Key legal, regulatory, and organizational standards that are necessary to ensure sustained operation will be reinforced.

The 2018 PFTC Workshop will offer two tracks—one for families thinking about creating a PFTC and another for families that currently have one, allowing families of differing experience levels to most productively use their time.

For more information on the FOX Private Family Trust Company Workshop, please visit <https://www.familyoffice.com/learning-programs/workshops/2018-fox-private-family-trust-company-workshop>.

About Family Office Exchange

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