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FOX Wealth Advisor Forum Provides Practical Responses to Market Shifts

Featuring critical updates and professional skill development for advisors serving in the ultra-wealth market

CHICAGO, April 3, 2018 – Family Office Exchange (FOX), a global learning and networking community of enterprise families and their key advisors, announced that this year's FOX Wealth Advisor Forum, entitled "Embracing the Future," will focus on practical business-building approaches to many of the disruptive issues affecting advisors to the ultra-wealthy. The Forum will be presented May 16-17 at the Kimpton Gray Hotel in Chicago.

Prominent experts will present useful approaches for addressing the many dislocations arising from the rapid innovations in investment technology, the ever-multiplying risks in cybersecurity, the increasing longevity of clients, the intense competition for talent, the need for adaptations in the workplace for Millennials, and disruptions in family businesses.

"There are new developments in the industry that advisors need to respond to. We're giving them the latest updates and the best thinking with an intentional direction," says Amy Hart Clyne, Executive Director of the FOX Knowledge Center and curator of the Forum. "The Forum offers two days of networking opportunities with the most accomplished advisors in the industry. The fresh insights and perspectives from both the speakers and peers will equip participants to confidently *embrace the future*."

2018 FOX Wealth Advisor Forum highlights include:

- **Longevity, Aging & Incapacity: Cutting-Edge Approaches to Managing Modern Risks** – Dr. James Grubman, a family wealth consultant with neuropsychological and estate-planning expertise, will lead an in-depth session on identifying the risks that come with increasing longevity and the solutions for advisory practices.
- **A Firm's Cultural Necessities in the New Talent Landscape** – Recruiting and retaining the best and brightest employees requires a strategic approach to talent. In this discussion, David Toth, Managing Director at Family Office Exchange, will be joined by Susan Colpitts, Founder and Chief of Client Experience at Signature Family Wealth

Advisors, and Mark Galante, President of Northeast Zone & Strategic Alliances at PURE Insurance. The three presenters will discuss their strategies in addressing the new talent landscape.

- **Innovation in Financial Services: Platforms, Artificial Intelligence & Blockchain** – R. Jesse McWaters, Financial Innovation Lead at the World Economic Forum, returns to provide insights on the cutting-edge thinking on innovation that was discussed at Davos this past January. He will identify where he thinks the major impact will be felt in the financial services space as new innovations are rapidly adopted and the next industrial revolution picks up steam.
- **Enhance Your Effectiveness by Refreshing Your Listening Techniques** – Laura Daley, Senior Consultant at Paravis Partners, will demonstrate how adopting a listening framework can help elevate your effectiveness as an advisor. The techniques will be applied to real-life examples and practiced with peers in this interactive session.

For more information on the 2018 FOX Wealth Advisor Forum, May 16-17 at The Kimpton Gray Hotel in Chicago, please visit https://www.familyoffice.com/waf.

About Family Office Exchange

To learn more about Family Office Exchange (FOX), visit www.familyoffice.com/media-kit.