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## **FOX Offering Public Webinar on What Millennials Look for in a Wealth Advisor**

*Executive Director Amy Hart Clyne to Examine How to Engage the Client of the Future*

**Chicago, March 12, 2015** – Family Office Exchange (FOX), a global membership organization of enterprise families and their key advisors, announced it will be offering a public webinar on the relationship between Millennial wealth owners and their advisors on Thursday, April 2, 2015 at 10 a.m. CDT.

The program, based on findings from the recent FOX “Engaging the Client of the Future” research, is a rare opportunity for the broader non-member community to get to see FOX research up close. FOX will share some unexpected conclusions from the study and give those curious about Family Office Exchange a chance to learn more about the organization.

FOX Executive Director Amy Hart Clyne will lead the discussion, which will cover:

- Five Millennial generational themes
- Eight recommendations for engaging Millennial family clients
- The distinct set of preferences and sensibilities Millennials bring to the table
- FOX-identified best practices

"While Millennials' needs are similar to those of their parents and grandparents, their expectations for how wealth advisors should meet those needs are notably different than those of earlier generations," says Hart Clyne. "This program will help participants gain insight into the Millennial point of view, understand the expectations of Millennial family clients, and identify ways to enhance their relationship with Millennials."

There is no charge for attending the webinar. Additional information is available at <https://www.familyoffice.com/learning-events/webinars/20150402-webinar-client-future-advising-millennials>.

### **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](http://www.familyoffice.com).