



Media contact  
**Marvin Pollack**  
[press@familyoffice.com](mailto:press@familyoffice.com)  
312-327-1200

## **Positioning the Small Family Office for the Future**

*A New Family Office Exchange Workshop Examines  
Options for Collaboration, Outsourcing*

**CHICAGO, January 5, 2011** – Family Office Exchange (FOX), a leading provider of research, education and networking support to private wealth owners, family office executives and wealth advisors, today announced a one-day workshop developed for owners and executives of small, single family offices who are interested in exploring alternative models for providing wealth management services.

“Small family offices continually seek ways in which they can make the most of their limited operational resources,” said Karen D. Neal, managing director of consulting for FOX. “The current economy and pending regulatory changes provide even more reason for these offices to take a fresh look at the scope of services they offer to wealth owners and how they deliver them.”

“The Evolution of the Small Family Office: Models for Sustainability,” scheduled for February 1 at the Four Seasons Hotel in Miami, is designed specifically for small family offices, bringing together leaders of offices with fewer than 10 employees to discuss such critically important issues as family office costs, long-term dilution of family wealth, family leadership, family cohesion and family office leadership.

This unique, solutions-oriented session from FOX and The Okabena Company, a leading family office and a FOX family office member, will draw on FOX proprietary research including the newly released study, “In Search of the Sustainable Small Family Office Model”, and will feature focused peer discussion of that research and models that will serve small offices well into the future.

Although long-term viability is not a serious concern for most small family offices, the FOX study shows these offices are watchful of costs and more inclined to consider structural or operational changes than in past years.

“The Evolution of the Small Family Office: Models for Sustainability” is open to non-FOX members at a cost of \$995 per person. However, registration is limited to individuals who own or work in family offices with fewer than 10 employees. For more information, visit [www.familyoffice.com/smalloffice](http://www.familyoffice.com/smalloffice).

**About Family Office Exchange**

Family Office Exchange (FOX) is a definitive source of knowledge and best practices associated with the business of managing family wealth. Founded in 1989, FOX provides industry knowledge and wealth owner education to more than 500 members in 22 countries from offices in Chicago and London. For more information, visit [www.familyoffice.com](http://www.familyoffice.com).

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