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Family Office Exchange Adds New Topics for Beneficiaries at

FOX Trustees & Beneficiaries Workshop in June

2016 Workshop Teaches How to Optimize the Trustee-Beneficiary Relationship

Chicago, March 24, 2016 – Family Office Exchange (FOX), a global membership organization of enterprise families and their key advisors, has announced the agenda for its 2016 FOX Trustees & Beneficiaries Workshop, June 22-23 in New York City. The 2016 edition of this popular two-day workshop features a new focus on the roles and responsibilities of beneficiaries in the critical trustee-beneficiary relationship, in addition to an in-depth look at the duties of a trustee.

“The FOX Trustees & Beneficiaries Workshop is a unique training opportunity that’s designed to help trustees and beneficiaries be more confident, better prepared, and develop a stronger relationship,” says Mariann Mihailidis, Managing Director at Family Office Exchange. “The workshop covers all the roles, risks and responsibilities of both trustees and beneficiaries, so all trustees and beneficiaries are strongly encouraged to attend.”

Additions to this Workshop include:

- **Beneficiaries** - New modules for Beneficiaries including discussion of the concept of the “Office of the Beneficiary.”
- **Trustees** - A broader view of the trustee role, clarifying that it is not just a job but an important role in the life of the beneficiary.
- **Risk** - The Risk section will highlight how to stay out of trouble using actual cases to illustrate the message.
- **Investment** - The investment section covers the requirements and duties for investing on behalf of current and future beneficiaries. New for 2016, it also now includes considerations for when a portion of the assets are invested in a closely held business.
- **Relationships** - Finally, we have expanded the section on building relationships between trustees and beneficiaries—especially when the beneficiaries are from different generations, which leads to issues of communication style and education needs.

“We may not offer this workshop annually moving forward, as we have to make room for other subjects in our Workshop series, so if you are a trustee or trust beneficiary, now is the time to take advantage of this unique and fundamental learning opportunity,” says Mihailidis. “Even if you have attended the Workshop before, this year's expanded and updated agenda makes it well worth your while to attend again.”

To learn more about the FOX Trustees and Beneficiaries Workshop, visit <https://www.familyoffice.com/learning-events/workshops/trustees-and-beneficiaries-workshop-june-22-23-2016>.

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.