Family Office Exchange®

FOX Fall Forum™

October 21-23, 2015

Engaging Families by Strengthening the Client Experience

JW Marriott

Chicago, IL

Finding ways to keep all family members interested and involved in family matters is a key objective of most family offices. This year's **FOX Fall Forum**™ provides a broad array of new ideas and skills to enrich the delivery of service and strengthen the family client experience.

The meeting kicks off with in-depth sessions on developing a family vision, preparing to engage in impact investing, helping younger generation members understand the different roles in a family of wealth, and addressing behavioral health issues.

There will be in-person meetings of all the FOX Networks with rich content on investing, technology, human resources, private family trust companies, owner education, and rising generation issues. The Forum will feature industry experts and family speakers and provide numerous opportunities to meet and network with people who share your interests and concerns.

Anyone interested in ensuring the future success of their family will want to participate in this Forum. Please join us for an engaging and inspiring member experience.

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FOX Fall Forum™ Speakers and Accommodations

October 21-23, 2015 | J.W. Marriott | Chicago, IL

Family Office Exchange

Guest Speakers

Sean Ammirati
Leading Partner, Birchmere Labs

Bruce K. Benesh
Partner in Charge, Grant Thornton

Andy Campbell
Partner, Novack and Macey, LLP

Jeffrey Carroll
Assistant Vice President, AIG Private Client Group

Diana Clark, J.D., MA
Director of Family Services, O'Connor Professional Group

Pamela Cytron
CEO, Pendo Systems

Max DeZara
Founder & Managing Partner, Akoya Capital

Michael Drexler
Head of Investors Industries of the World Economic Forum

Ann Dugan
Managing Director, Family Advisory Services, Headwaters | SC

Charles Eggert
Managing Director, Specialty Chemicals Sector Leader, Akoya Capital

Ken Franasiak
Chairman and CEO, Franasiak/Calama

Rob Gerhard
CEO, Umbono Capital

Andrea Hasten, CPA, J.D., MBA
Senior Vice President, Northern Trust

Marianne Herlihy
Family Office Advisor, Hemenway & Barnes, LLP

Annie Hernandez
Executive Director of the Frieda C Fox Family Foundation

Dan Kipp
Founder, Managing Partner, City Capital Ventures

Charly Kleissner, Ph.D.
Co-Founder, Toniic

Peter Knell
Managing Director, Knell/KCB

Kim Kusilek
CFO, HRK Group, Inc.

Greg McCann
Founder and Consultant, McCann & Associates

Robert M. McLane, Jr.
Senior Director, BNY Mellon

Abigail Noble
CEO, The ImPact

Arden O'Connor
Founder, O'Connor Professional Group

Danielle Oristian York
Director, 21/64

Miles C. Padgett, J.D. & CIMA
Partner, Kozusko Harris Duncan

Steven Ryder
CEO, True North Networks

Bill Seale
President, Shoebox Private Trust Company, LLC

Jordan Slone
Slone Family Office, Chairman, Harbor Group International

Jonathan Spencer
Director, Capital Markets, Umbono Capital

Allen Tibshrany
Managing Director, City Capital Ventures

Matthew Tobin
Managing Director, South Dakota Trust Company, LLC

Margalit Tocher
President, Home Healthcare Assistance

Margaret Vaughan
Founder and President, MCV Consulting

Matthew Wesley, J.D., M.Div.
Founder, The Wesley Group

Jonah Wittkamper
Co-Founder and Global Director, Nexus Global Youth Summit

For the most current list of speakers and sessions please visit www.familyoffice.com.

FOX Speakers

Heather Asher
Senior Relationship Manager, Family Office Exchange

Teresa Bellock
Editor-in-Chief, Family Office Exchange

Karen Clark
Managing Director, Councils, Family Office Exchange

Steven Draper
Senior Consultant, Family Office Exchange

Ruth Easterling
Managing Director, Member Services, Family Office Exchange

Jane Flanagan
Director of Family Research, Family Office Exchange

Charlie Grace
Managing Director, Family Office Exchange

Sara Hamilton
Founder and CEO, Family Office Exchange

Amy Hart Clyne
Executive Director, Knowledge Center, Family Office Exchange

Meghan McWalters
International Relationship Manager, Family Office Exchange

Mariann Mihailidis
Managing Director, Councils, Family Office Exchange

Alexandre Monnier
President, Family Office Exchange

Kasey Mueller
Director of Human Capital, Family Office Exchange

Karen Rush
Director of Membership, Family Office Exchange

Linda Shepro
Managing Director, Family Office Exchange

David Toth
Director of Advisor Research, Family Office Exchange

Jo Wellman
Senior Relationship Manager, Family Office Exchange

Hotel Accommodations

JW Marriott Chicago
151 West Adams Street
Chicago, IL 60603
Phone: 312.660.8200

How to Make a Reservation:
Call: 877.303.0104
Mention "Family Office Exchange"

Note: Reservations should be made by Friday, September 25, 2015 in order to secure the group rate.

10:00 am First Time Attendee Orientation

Session Hosts: Ruth Easterling, Managing Director, Member Services, Family Office Exchange; Jo Wellman, Senior Relationship Manager, Family Office Exchange

Includes Speed Networking

11:30 am Welcome Luncheon

Session Host: Alexandre Monnier, President, Family Office Exchange

1:30 pm Workshops

Choose one 3-hour workshop from the four options listed.

Workshop 1 Developing a Family Vision for the Future

Facilitators: Sara Hamilton, Founder and CEO, Family Office Exchange; Margaret Vaughan, Founder and President, MCV Consulting
Session Host: Alexandre Monnier, President, Family Office Exchange

A multigenerational family can benefit from a visioning process when moving from one stage of the enterprise to another—perhaps facing a change in leadership or a change in ownership of key family assets. The time for a Family Visioning process has come when family members can see a major change coming, but are uncertain as to how the transition will occur.

The value of the Family Visioning process is to identify and address the fundamental questions that a family needs to answer in order for changes to occur smoothly. The process helps clarify family goals, as well as areas where those goals—and pathways to achieving them—are not aligned for common benefit. The outcome from the process is a greater ability to keep the family together, because the family is able to develop and adopt a future vision they believe in and want to support.

In the workshop session, Sara Hamilton and Margaret Vaughan will talk about setting the stage for a successful visioning process—identifying values and guiding principles, and evaluating opportunities and risks that must be considered in the midst of any transition process. Attendees will learn how to identify driving forces and key uncertainties in the family's future, and how to address these challenges. They will use scenario planning exercises to define the predictable outcomes that are likely to occur if nothing changes and the desirable outcomes they might expect if change is thoughtfully planned out.

The process culminates in a consensus view of the desired state for the future and identifies ways to implement the vision that the family has endorsed. Specific strategies are clearly mapped out with timelines, and progress can clearly be measured. Examples of these steps in the process will be shared with the attendees. At the end of the workshop session, there will be time for questions from the audience and brainstorming about what may be holding your family back from thoughtfully planning for the future.

Workshop 2 Engaging in Solution-Building: The Impact Investing Game

Facilitators: Abigail Noble, CEO, The ImPact; Michael Drexler, Head of Investors Industries of the World Economic Forum
Session Host: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange

Change is never easy, especially with the challenge of mainstreaming impact investing. But when change is fun, it is easier for those faced with seemingly insurmountable challenges to begin to see opportunities. For the past three years in Davos, the World Economic Forum (WEF) has designed and implemented elaborate and highly competitive interactions with investors, social entrepreneurs and government officials. The experience has resulted in a competitive and dynamic game that not only helps break down barriers between participants with different perspectives, but also allows them to creatively explore what they can do to move impact investment needs to the next level.

Abigail Noble and Michael Drexler will lead FOX family members in an interactive and thought-provoking Impact Investing Game that will guide participants in approaching problems from multiple angles and incorporating multidisciplinary thinking— including understanding how professional backgrounds can create entrenched perspectives and limited flexibility for innovation; how engaging in solution building can lead to mindset change because of counter-attitudinal advocacy; and how relaxing the constraints of a problem set can lead to more innovative solutions. Lessons learned will not only help drive the family's impact investing decisions, but also their overall decision-making process.

1:30 pm Workshops

Workshop 3 Assessing Family Wealth Roles: Lay It on the Line Exercises

Facilitator: Danielle Oristian York, Director, 21/64 ; Annie Hernandez, Executive Director, Frieda C. Fox Family Foundation
Session Host: Karen Clark, Managing Director of Councils, Family Office Exchange

Utilizing a series of interactive, fast-paced and fun kinesthetic exercises, Danielle Oristian York will guide attendees through an exploration to gain deeper insight into your their assumptions around wealth, roles and the generational perspectives at play in your family. As part of the workshop, Danielle will facilitate three unique exercises:

- Family Diagram - Dedicated to helping family members see the patterns of the multigenerational family system, identify roles and how paradigms can be shifted into a multi-person mode of understanding choices and behavior in the family.
- Money Messages - A conversation-based activity to clarify the messages that are driving behaviors regarding spending, saving, investing and giving.
- rolePLAY - An exercise that leverages the powerful act of play to help participants clarify the role they desire to play, and what opportunities and challenges are faced when stepping into a new role.

Workshop 4 Addressing Behavioral Health Issues and Addictions in the Family

Facilitators: Arden O'Connor, Founder, O'Connor Professional Group; Diana Clark J.D., MA, Director of Family Services, O'Connor Professional Group
Session Host: Ruth Easterling, Managing Director, Member Services, Family Office Exchange

Addiction and other chronic behavioral health issues can present significant risks to family well-being and wealth preservation, and recent research suggests higher incidence of these issues within affluent communities. In this workshop, Arden O'Connor, will focus on the connection between money and addiction as well as other chronic behavioral health issues, signs and symptoms indicating there may be a problem, how to raise concerns about behavioral health issues with individuals and in family meetings, and treatment models that can increase the odds of successful outcomes and aid the whole family.

6:00 pm Rising Generation of Leaders Reception

Hosted By: Heather Asher, Senior Relationship Manager, Family Office Exchange; Meghan McWalters, International Relationship Manager, Family Office Exchange; Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange

7:00 pm Family Members, Office Executives and Thought Leaders Council Dinner

J.W. Marriott

7:30 am **Breakfast and Registration**

8:30 am **Welcome, Program Overview and FOX Trends Update**

Session Host and Speaker: Alexandre Monnier, President, Family Office Exchange

A critical element of Family Office Exchange's work is to identify trends and issues that have immediate and future impact on families of wealth. As such, Alexandre Monnier is pleased to share the trends emerging in the family wealth industry and how these trends will impact families today and well into the future, what families will need to do to prepare for these inevitabilities, and how these trends link to the client experience mindset.

9:15 am **Defining and Aligning The Client Experience**

Session Host: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange
Speakers: Marianne Herlihy, Family Office Advisor, Hemenway & Barnes, LLP; Robert M. McLane, Jr., Senior Director, BNY Mellon

Family Office Exchange has been leading the charge to examine essential elements of the client experience and the influence these elements have on today's families as well as families of the future. Key to this assessment is defining what family office executives, advisors with whom families will engage, and of course families themselves need to do to more effectively meet the unique and emerging needs of enterprising families.

10:30 am **Break**

11:00 am **Family Peer Dialogue Sessions**

Structured Peer Dialogue for Family Members and Family Office Executives

Please choose one of the following sessions:

- Wealth Owners and Family Leaders
- Executives for Business-centric Offices
- Executives of Small Offices (1-5 employees)
- Executives of Medium Offices (6-15 employees)
- Executives of Large Offices (16+ employees)

Advisor Breakout Session

Assessing High Impact Trends in the Family Office Industry

Session Hosts: Alexandre Monnier, President, Family Office Exchange; David Toth, Director of Advisor Research, Family Office Exchnage; Karen Rush, Director of Membership, Family Office Exchange

- Thought Leaders Council
- MFO Council
- Advisors and Guests

12:30 pm **Networking Luncheon**

2:00 pm FOX Network Learning Tracks: Session One

FOX Networks provide an effective way for members to stay up-to-date on the issues and skills that apply to key family office disciplines. Each Network focuses on one discipline or member subset, making it easy to tap into the exchange of EDUCATION or ideas via PEER EXCHANGE and advice from fellow FOX members, industry experts, and FOX research.

Track 1 Educating Owners — Family Culture and Embracing Change
Powered by the FOX Owner Education Network

Network OWNER ED

Session Host: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange
Speakers: Matthew Wesley, J.D., M.Div., Founder, The Wesley Group; Sara Hamilton, Founder and CEO, Family Office Exchange

Family success over generations is often contingent on the health and vibrancy of family culture. Family culture can destroy legacy, decimate planning, and wreak havoc on even the best laid plans of founders, professionals and family leaders. This session will help bring clarity to the confusing dynamics of family culture and, more importantly, provide strategies and techniques used to make adaptive cultural shifts. Matt Wesley and Sara Hamilton will guide this highly interactive session so that participants will leave not only with a better understanding of the landscape, but also with the essence of creating more adaptive cultures.

Track 2 The Rising Generation — Social Media…How Do You Protect Yourself and Your Family?
Powered by the FOX Rising Generation of Leaders Network

Network RISING GEN

Session Hosts: Heather Asher, Senior Relationship Manager, Family Office Exchange; Meghan McWalters, International Relationship Manager, Family Office Exchange
Speakers: Andy Campbell, Partner, Novack and Macey, LLP; Jeffrey Carroll, Assistant Vice President, AIG Private Client Group

More than 58 million Americans use social networking sites several times per day. Social media has created a new sense of reality—a reality that its benefits have outweighed the risks. Liability risks involved with the use of social media include defamation, invasion of privacy and negligence. This session will provide awareness into the risks as well as the solutions to minimize the evolving dangers of social media.

Track 3 Investing Directly — Direct Investing: Industry Sector Dynamics
Powered by the FOX Direct Investing Network

Network DIN

Session Hosts: Linda Shepro, Managing Director, Family Office Exchange; Karen Clark, Managing Director, Councils, Family Office Exchange

The DIN Network invites you to participate in a Three-Part Industry Sector Dynamics discussion.

Part 1: Working the Plan – City Capital Venture's seasoned deal team, Dan Kipp and Allen Tibshrany will explore the critical steps necessary to ensure success in the first 18 months post-investment, including guidance on governance, transparency and reporting.

Part 2: Unlocking opportunities in Natural Resources - Rob Gerhard CEO and Johnathan Spencer, Director, Capital Markets of Umbono Capital will highlight one family's direct investing focus in natural resources and how they see significant opportunity due to both cyclical and structural changes in the sector, in both the US and in emerging markets.

Part 3: Specialty Chemical Sector – Max DeZara and Charles Eggert of Akoya Capital will discuss their 5-Sector approach to direct investing and will highlight timely involvement and nuances of the specialty chemical sector.

Track 4 Advancing The Family Trust — Lessons Learned When Forming Private Trust Companies
Powered by the FOX Private Family Trust Company Network

Network PFTC

Session Host: Mariann Mihailidis, Managing Director, Councils, Family Office Exchange
Speakers: Kim Kusilek, CFO, HRK Group, Inc.; Bill Seale, President, Shoebox Private Trust Company, LLC

Establishing a Private Family Trust Company (PFTC) is a significant step in a family's evolution from managing its wealth to institutionalizing its family governance, trustee processes and strategic direction as a family enterprise. In this session, the PFTC Network community comes together for a discussion around lessons learned when forming a Private Trust Company. Participants, led by experienced executives, will share the challenges, insights and unexpected benefits gained through the private family trust company structure.

Track 5 Managing Information — TODS Network Idea Exchange - Cybercrime: It's All About You and Steps to Combat It
Powered by the FOX Technology Operations & Data Security Network

Network TODS

Session Host: Steven Draper, Senior Consultant, Family Office Exchange
Speaker: Steven Ryder, CEO, True North Networks

This session will review latest trends in cybercrime and why it's growing exponentially. There is big money in hacking secure financial information, no matter the size of the business for these criminals, the opportunities are limitless. We will review the SAN Critical Security Controls, which are simple good business practices to secure and monitor your network. Additionally, we will review steps we all can take to protect ourselves and our businesses against these endless threats.

Track 6 Developing Professionals — Implementing an Agile Vertical Leadership Framework
Powered by the FOX Human Capital Network

Network HCAP

Session Host: Kasey Mueller, Director of Human Capital, Family Office Exchange
Speaker: Greg McCann, Founder and Consultant, McCann & Associates

Our world is becoming more complex and interdependent. Business cycles, planning horizons, and even generations are all getting shorter in a world where everything affects everything. To be a leader today requires the agility to develop how you think, not just increasing what you know. This concept is known as vertical leadership, the number one trend in leadership development today. Participants will be provided with the necessary tools to become more agile leaders and practices to develop these key agilities in their lives as well as in the lives (and families) of the people with whom they engage.

3:45 pm FOX Network Learning Tracks: Session Two

Choose from one of the following session options.

Track 1 Educating Owners — Family Education In Action
Powered by the FOX Owner Education Network

Network OWNER ED

Session Hosts: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange; Teresa Bellock, Editor-in-Chief, Family Office Exchange
Speakers: FOX members will contribute their insights on family education

Family education is critical to wealth sustainability. In this session, participants will hear directly from families who have successfully implemented family education programs and the challenges and obstacles they have had to overcome to design, develop and deliver quality programming. In addition, family members will share information about the types of programs they are delivering as well as the outcomes of their implemented learning strategies. Families will also share lessons learned and will answer the question, "What do you wish someone had told you before you started this project?"

Track 2 The Rising Generation — The Sandwich Generation and Eldercare Issues
Powered by the FOX Rising Generation of Leaders Network

Network RISING GEN

Session Host: Heather Asher, Senior Relationship Manager, Family Office Exchange
Speakers: Margalit Tocher, President, Home Healthcare Assistance; Andrea Hasten, CPA, J.D., MBA, Senior Vice President, Northern Trust

With the aging of the Boomer generation comes the challenge of eldercare and its ultimate impact on families and designated caregivers. Often those caregivers are a part of the Sandwich Generation—a generation of people, typically in their 30s to 50s, responsible for both bringing up their own children and caring for their aging parents. Margalit Tocher and Andrea Hasten will trace the challenges and obstacles of the aging generation and provide strategies and guidance for caregiver families. They will provide tools and resources for addressing this critical need.

Track 3 Investing Directly — Direct Investing: Opportunities in the Real Estate Market
Powered by the FOX Direct Investing Network

Network DIN

Session Hosts: Linda Shepro, Managing Director, Family Office Exchange; Karen Clark, Managing Director, Councils, Family Office Exchange
Panelists: Ken Franasiak, Chairman and CEO, Franasiak/Calamar; Peter Knell, Managing Director, Knell/KCB; Jordan Slone, Slone Family Office, Chairman, Harbor Group International

Families whose core business is real estate will share their experiential knowledge of market conditions, their view on current and future opportunities, specific strategies for a successful real estate portfolio and discuss various structures for effective deployment of capital in this sector.

Track 4 Advancing The Family Trust — The Art and Complexity of Trust Distributions - Your Committee, Your Policy and Your Practice
Powered by the FOX Private Family Trust Company Network

Network PFTC

Session Host: Ruth Easterling, Managing Director, Member Services, Family Office Exchange
Speakers: Matthew Tobin, Managing Director, South Dakota Trust Company, LLC; and Miles C. Padgett, J.D. & CIMA, Partner, Kozusko Harris Duncan

Distributions have many implications for the Private Family Trust Company (PFTC). The responsibilities of the PFTC in preserving the corpus and being true to the role of the trustee must also align with the changing needs of the family. This peer dialogue will center on a case study examining the art and complexity of family distributions and provide tools, strategies, lessons learned and insight into preparing for the intricacies inherent in distributions.

Track 5 Managing Information — Navigating The Integration Challenge
Powered by the FOX Technology Operations & Data Security Network

Network TODS

Session Host: Steve Draper, Senior Consultant, Family Office Exchange
Speaker: Pamela Cytron, CEO, Pendo Systems

In a session dedicated to discussing global investment transparency and data governance, Pamela Cytron, CEO Pendo Systems, a global financial technology company, and Steven Draper will lead a discussion on automating the challenges of managing portfolios, exposure and inventory. Included in the discussion will be managing the back office and how to leverage valuable data in the capital markets industry, universal position inventory and counter-party risk.

Track 6 Developing Professionals — Highlights from the 2015 FOX Compensation and Benefits Survey
Powered by the FOX Human Capital Network

Network HCAP

Session Host: Kasey Mueller, Director of Human Capital, Family Office Exchange
Speakers: Jane Flanagan, Director of Family Research, Family Office Exchange; Bruce K. Benesh, Partner in Charge, Grant Thornton

Over 100 families shared their compensation data and practices as part of the 2015 FOX Compensation Benchmarking Survey. The report, distributed in late September, includes a comprehensive analysis of individual compensation categorized by size of staff. Included in the survey results is an analysis of incentive compensation—methodology and annual targets for short-term incentives, types and structure of long-term incentive compensation, current compensation practices, benefits and perquisites and PTO. Please join principal researcher, Jane Flanagan, as she shares data and the impact it might have on creating and maintaining a competitive edge in recruiting and retaining talent. Time will be allotted for dialogue related to any HR concern, beyond compensation, that you wish to discuss with the network community.

7:00 pm All Member Dinner at the Museum of Broadcast Communications

The stated mission of The Museum of Broadcast Communications is "to collect, preserve, and present historic and contemporary radio and television content as well as to educate, inform and entertain through the museum's archives of public programs, screenings, exhibits, publications and online access to resources." Family Office Exchange is pleased to offer a nostalgic look into the museum's communications archives as the backdrop for an evening of networking and entertainment.

Museum of Broadcast Communications, 360 N State St, Chicago, IL 60654

7:30 am **Breakfast**

9:00 am **Opening Remarks – Strategies to Enhance Owner Engagement**
Speaker: Sara Hamilton, Founder and CEO, Family Office Exchange

9:20 am **Developing an Entrepreneurial Spirit in the Family**
Session Host: Karen Clark, Managing Director, Councils, Family Office Exchange
Speakers: Ann Dugan, Managing Director, Family Advisory Services, Headwaters | SC; Sean Ammirati, Leading Partner, Birchmere Labs

Entrepreneurs assemble resources, create innovations, develop finance strategies and apply business acumen in an effort to create economic goods and services. The ultimate question is, "How do you instill these attributes in your rising generation?" Ann Dugan, who founded the University of Pittsburgh's Institute for Entrepreneurial Excellence, will lead an exploration on how to create an entrepreneurial spirit in the rising generation. Ann will guide participants on not only what goes into creating and fostering that spirit, but how one can take action to support and implement entrepreneurial endeavors. Utilizing megatrends and the opportunities they provide for a prepared entrepreneurial family, Ann will provide a step-by-step guide to building and sustaining an entrepreneurial family culture.

10:30 am **Break**

11:00 am **Finding Your Life Purpose**

Session Host: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange
Speaker: Jonah Wittkamper, Co-Founder and Global Director, Nexus Global Youth Summit

In an effort to promote a culture of greater giving and well-being for all, Nexus Global Youth shines light on the experience and impact of having wealth and what can be done to support and inspire the next generation of philanthropic leaders. Given the unique nature of the generation and their experiences, Nexus research proposes that, instead of focusing on the technicalities of philanthropy, focusing on the relationships and emotional development behind philanthropy is the most effective and beneficial approach to promote generosity. Using modern research and relevant perspectives, this session will provide an overview of what we know about this next—generation of wealth holders, what we know about the nature of giving, and what we can do to further support and cultivate a generation where all will thrive.

12:00 pm **Closing Luncheon - Impact Investing, an Accelerator for Economic Return**

Session Host: David Toth, Director of Advisor Research, Family Office Exchange
Moderator: Charly Kleissner, Ph.D., Co-Founder, Toniic
Family Members Panel: Ian Simmons, Co-Founder and Principal, Blue-Haven Initiative; Gijs Voskamp, Founder, Ocean Capital Holdings

The movement of money into investments that create environmental and social change is gaining momentum, yet the perception that impact investing goes hand in hand with sub-market financial returns has hampered the wider adoption of this promising approach to investing in positive change.

Charly Kleissner co-founded Toniic and the 100% IMPACT Investing Network, global networks of action-oriented impact investors, focused on providing practical education and best practices to ultra-wealthy individuals, family offices, and foundation and endowment principals. Charly will share an overview and analysis of the current state of the impact investing ecosystem, will demystify the impact investing jargon and will explain the successes, challenges, and opportunities in the industry. Two impact investing couples who have taken innovative and effective approaches to impact investing will make the case that impact investing can—in many cases—be an accelerator for economic return.

2:00 pm **Forum Adjourns**

FOX Fall Forum™ Registration

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Family Office Exchange

FO Registration

Three ways to register:

1. **Register online** at **www.familyoffice.com**
2. **Scan and email** to **events@familyoffice.com**
3. **Fax this form** to our Events Team at **312.327.1212**

Name (First/Last)

Name as you would like it to appear on your badge

Family/Firm Name

Title/Position

Street Address

City State/Province

Country Zip/Postal Code

Phone Fax

E-mail

Special Dietary/Accessibility Needs

❍ I am a first-time attendee

Will you attend the First Time Attendees Orientation and Speed Networking?

❍ Yes ❍ No

Session Materials

❍ I will download the materials (Extra binders will not be available.)

❍ I would like a printed binder with session materials

Registration Fees

FOX Members - Family Owners and Family Office Executives:

❍ Registration Fee Included in FOX membership.

❍ First paid attendee: $2,000, ❍ Second paid attendee: $1,550

Thought Leaders Council Members:

❍ Registration Fee Included in FOX membership.

NON-Member Owners and Family Office Executives:

❍ First Paid Attendee: $2,500, ❍ Second Paid Attendee: $2,000

Total amount to charge $__________

Accomodations

❍ I will make a reservation at the JW Mariott for FOX Fall Forum

❍ I will not stay at the JW Marriott for FOX Fall Forum

❍ I am not sure, my plans are not finalized yet

Payment Method

❍ Payment by check is enclosed.

❍ Please charge the following credit card:

❍ VISA ❍ MasterCard ❍ American Express

Cardholder Name

Card Number Expiration Date Security Code

Billing Address for Credit Card

City State/Province Zip/Postal Code Country

Cardholder's Signature

Hotel Information

JW Marriott Chicago | 151 West Adams - Chicago, IL 60603

FOX has reserved rooms at the JW Marriott at a rate of $306 per night plus applicable taxes. To obtain the special rate, contact reservations at **866.270.6430** and mention Family Office Exchange. Please note that Forum attendees are responsible for making their own hotel reservations by September 25 to ensure the group rate.

Event Refund Policy

For event registrations, refunds of payment or return of event credits will be offered if the cancellation is made in writing to Family Office Exchange at **events@familyoffice.com** five or more business days prior to the start of the event.

Please select the sessions you plan to attend:

Wednesday, October 21

❍ I will attend the Welcome Luncheon at 11:30 am.

(Choose one 3-hour workshop from the options below)

❍ **Workshop 1:** Developing a Family Vision for the Future

❍ **Workshop 2:** Engaging in Solution-Building: The Impact Investing Game

❍ **Workshop 3:** Assessing Family Wealth Roles: Lay It on the Line Exercises

❍ **Workshop 4:** Addressing Behavioral Health Issues and Addictions in the Family

❍ I will attend the Rising Generation of Leaders Reception at 6:00 pm. *(This reception is limited to family members in the "Rising Generation")*

❍ I will attend the Family Member, Office Executive, and Thought Leaders Council Dinner at 7:00 pm.

Thursday, October 22

❍ I will attend the Breakfast.

Choose one of the following family office peer dialogue sessions:

Limited to Family Members and Family Office Executives.

❍ Wealth Owners and Family Leaders

❍ Executives for Business-centric Offices

❍ Executives of Small Offices (1-5 Employees)

❍ Executives of Medium Offices (6-15 Employees)

❍ Executives of Large Offices (16+ Employees)

❍ I will attend the Advisor Member Peer Dialogue Session. (TLC, MFO, Advisors)

❍ I will attend the Networking Luncheon.

(Choose one session at each time slot from the track list below.)

Track 1: Educating Owners (Network OWNER ED)

❍ **2:00 pm** Family Culture and Embracing Change

❍ **3:45 pm** Family Education in Action

Track 2: The Rising Generation (Network RISING GEN)

❍ **2:00 pm** Social Media-How Do You Protect Yourself and Your Family?

❍ **3:45 pm** The Sandwich Generation and Eldercare Issues

Track 3: Investing Directly (Network DIRECT INVEST)

❍ **2:00 pm** Direct Investing: Industry Sector Dynamics

❍ **3:45 pm** Opportunities in the Real Estate Market

Track 4: Advancing The Family Trust (Network PFTC)

❍ **2:00 pm** Lessons Learned When Forming Private Trust Companies

❍ **3:45 pm** The Art and Complexity of Trust Distributions

Track 5: Managing Information (Network TODS)

❍ **2:00 pm** TODS Network Idea Exchange: Cybercrime

❍ **3:45 pm** Navigating The Integration Challenge

Track 6: Developing Professionals (Network HCAP)

❍ **2:00 pm** Implementing an Agile Vertical Leadership Framework

❍ **3:45 pm** Highlights from 2015 FOX Compensation and Benefits Survey

❍ I will attend the All Member Dinner at the Museum of Broadcast Communications.

Friday, October 23

❍ I will attend the Breakfast.

❍ I will attend the Closing Luncheon Session: Impact Investing, an Accelerator for Economic Return

CPE You may earn up to 7.5 CPE credits for attending this Forum.

Agenda subject to change.