

INSTRUCTIONS: This Form must be completed and submitted to Family Office Exchange (FOX) at programs@familyoffice.com to determine whether your program proposal meets the FOX content standards. A decision or status confirmation will be made within four weeks after receipt of your submission. If you have any questions, please contact your FOX Relationship Manager or call 1.312.327.1200.

FOX Use Only:

TYPES OF CONTENT APPROPRIATE FOR FOX PROGRAMS:

- Thematic and cutting-edge, problem-solving approaches to issues facing members of the FOX community.
- Unique research, data, and techniques that advance the knowledge and performance of FOX members.
- Keynote presentations that advance the thinking, practice, and professional development of members of the FOX community.

PART A—CONTRIBUTOR INFORMATION & DATE OF SUBMISSION

Name:	Phone:
Company:	Email:
Address:	Date of Submission:

PART B—SUPPLEMENTAL MATERIALS THAT EXPLAIN THE PROPOSAL (check all that apply)

<input type="checkbox"/> Whitepaper (PDF file)	<input type="checkbox"/> Video (.mp4, YouTube or Vimeo file)	<input type="checkbox"/> Other Materials (please describe):
<input type="checkbox"/> Webinar & PowerPoint Presentation	<input type="checkbox"/> Podcast (.mp3 file)	

PART C—PROGRAM TITLE

PART D—PROGRAM DESCRIPTION/SUMMARY (80 – 140 words)

PART E—PROGRAM & TOPIC PROPOSAL (What is the educational content you want to provide?)

PART F—KEY TAKEAWAYS OF THE PROGRAM (What will the FOX audience learn? Why is this program important?)

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7.

PART G— SPEAKER PROFILE AND QUALIFICATIONS

(Attach CV with this Form. If more than one speaker, please attach a separate list.)

Name:	Phone:
Company:	Email:
Address:	Date of Submission:

PART H—SPEAKER PUBLICATIONS, APPEARANCES, AND LINKS DEMONSTRATING EXPERTISE ON THE TOPIC

(If additional space is needed, please attach a separate list to this Form.)

1.

2.

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5.

PART I—SUBMIT YOUR PROPOSAL

By entering your name and submitting this Program Proposal Submission Form to FOX, I confirm that the information submitted and any attachments thereto are accurate.

Name:

Date:

PART J—FOR FOX USE ONLY: REVIEW AND DETERMINATION OF PROGRAM PROPOSAL SUBMITTED

 Program proposal, as submitted, meets the FOX content requirements.

 Program proposal, as submitted, does not meet the FOX content requirements.

 Program proposal, as submitted, is accepted with the following modifications:

 More information is required to make a determination (see comments below).

Comments:
Name of Reviewer:
Date of Review: