



## A Buyers Journey From Selection to Implementation of a New Reporting and Analytics Platform

FOX Moderator

**Kent Lawson**, Director, Technology Integration Services, FOX

Guest Speakers

**Susan (Sue) McDermott**, Head of Family Office Solutions, Addepar

**Peter O'Brien**, Vice President of Sales, Addepar

**Eric Weikert**, Senior Director, Addepar

FOX Webinar | December 15, 2020

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## Learning Objectives

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- Identify common difficulties in finding and assessing new technology
- Prepare for conversion and successful data aggregation
- Describe 5 things every family office should consider post COVID-19

## Who you will be hearing from

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**Susan McDermott**

Head of Family Office Solutions



**Peter O'Brien**

Vice President of Sales



**Eric Weikert**

Senior Director of Professional Services

Addepar is a wealth management platform that specializes in data aggregation and performance reporting for even the most complex investment portfolios.

## Finding the path to balance stability and growth



### Safe, secure data aggregation

Bringing the family's growth-sensitive and wealth-preservation assets together in a single place



### Maintaining a level of control

Letting go of Excel and still keeping control of a complex portfolio, budgeting, and administrative tasks



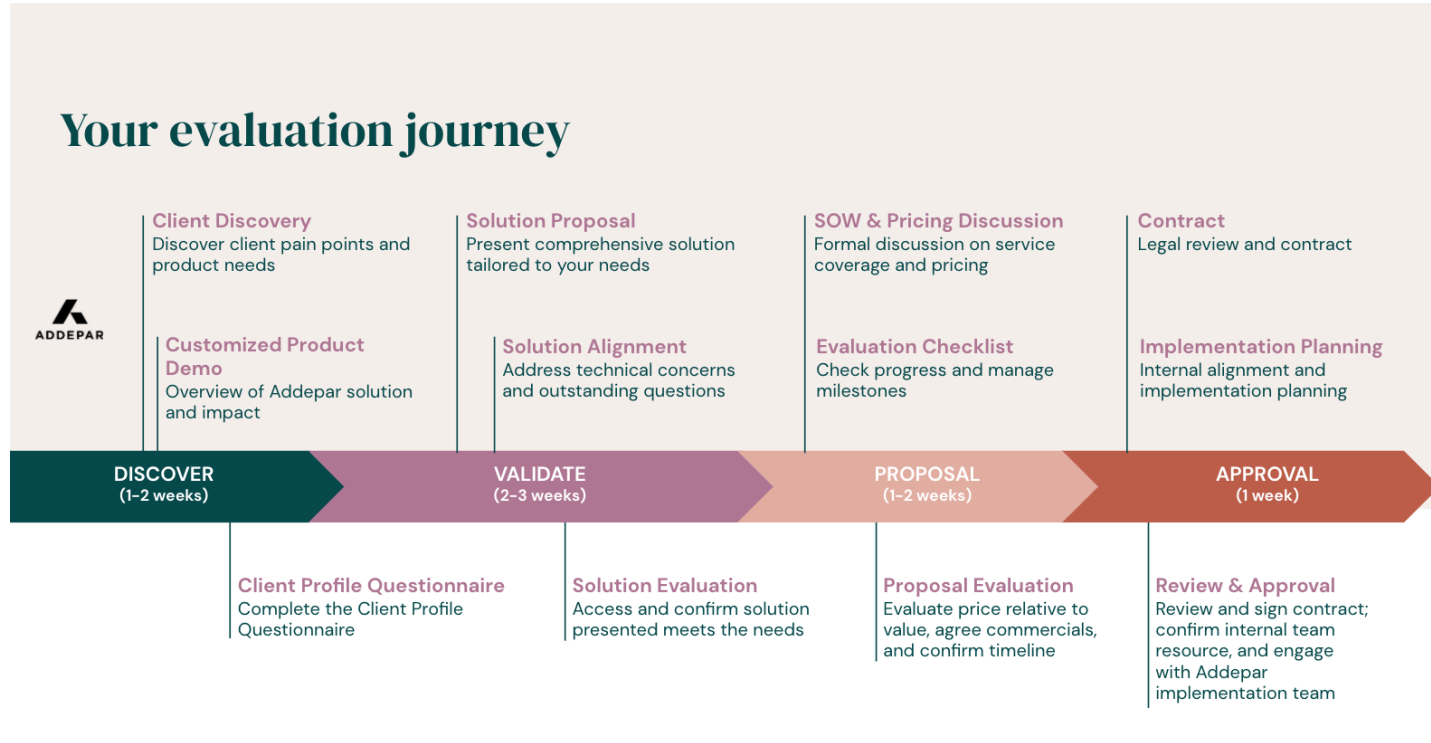
### Providing a return on technology adoption

Taking a leap of faith to modernize and finding a proven vendor to provide a return on their technology investment

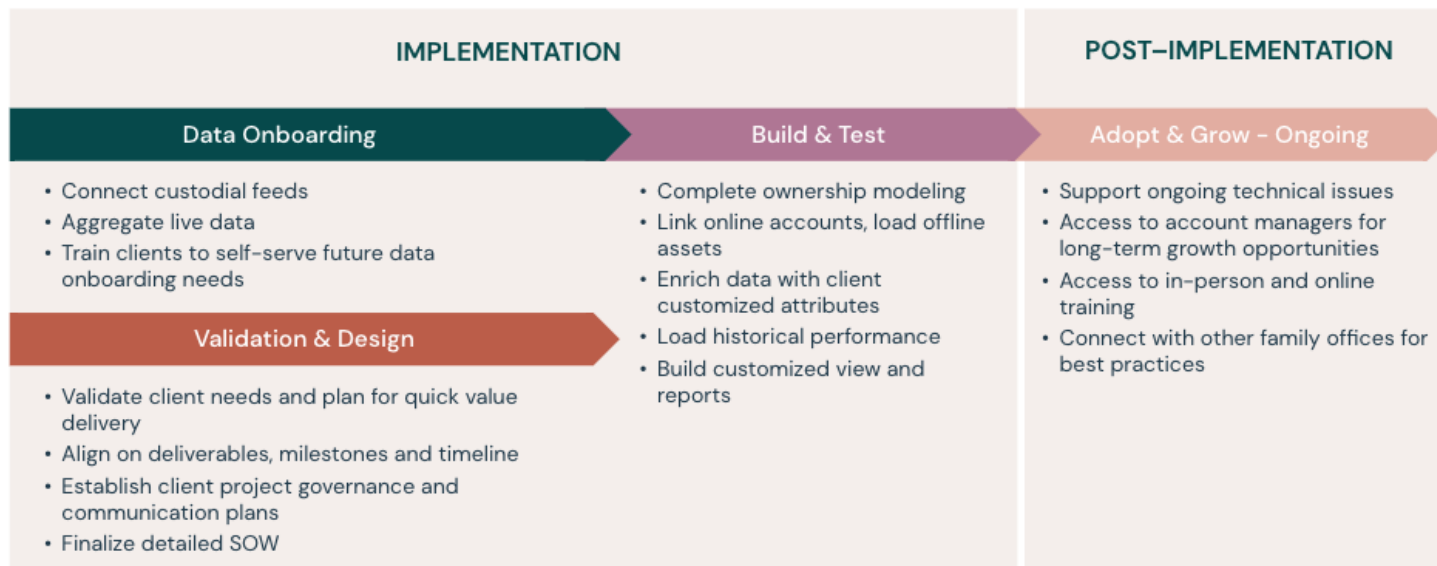
*"Family offices embrace and manage risk in their portfolios like no other investor. They need to shift that focus to embracing technology to deliver growth and future sustainability."*

2020 Global Family Office Report 

## Your evaluation journey

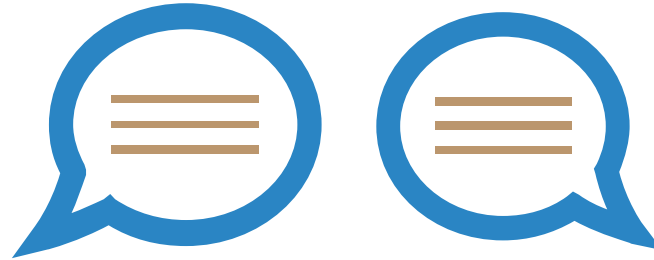


## Your journey to success



Data Onboarding Specialist & Solutions Consultant

DataOps, Support Analyst, Client Success Manager, Account Manager



**Susan McDermott**  
Head of Family  
Office Solutions



**Peter O'Brien**  
Vice President of  
Sales



**Eric Weikert**  
Senior Director of  
Professional Services





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Family Office Exchange | 30 YEARS

### FOX Private Trust Company Workshop

Virtual Event | January 26-28, 2021

The banner features a potted plant with a green top and a silver camera lens in the center, set against a background of architectural blueprints.



VIRTUAL EVENT

### FOX RISING GEN LEADERSHIP PROGRAM

February 24-25, 2021

The banner features a blue-tinted city skyline background.

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