Family Office Exchange | 30 YEARS

2020 FOX Family Office Forum™
AGENDA

Monday, September 21, 2020

Login to the event portal at https://event.crowdcompass.com/fofv20

All times are in Central Time

10:00 am **Welcome and Introductions**

Glen W. Johnson, Chief Operating Officer, Family Office Exchange

10:10 am **Ready or Not - Your Future Family Office is Here**

Bill Sullivan, President, Family Office Exchange

The evolution of family priorities and the acceleration of technological advances are reshaping the future of the Family Office. We will share insights into the Future of the Family office across four pillars of change: Shifts in Family Priorities, Proliferation of Technology, Evolution of Talent Profile, and Rising Importance of Partnerships.

10:20 am **Evolving Client Needs and Expectations are Changing the Role of the Family Office**

Moderator: Glen W. Johnson, Chief Operating Officer, Family Office Exchange

Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer, Family Office Exchange

Gaby Griffin, Market Leader, Business Owners and Family Executives, Family Office Exchange

How are you managing changes in your family? How about the changes coming down the road? We will share examples of how the shift in family priorities and the influence of the rising generations are driving the family office evolution.

10:45 am **Future of Technology in the Family Office**

Moderator: Kent Lawson, Director, Technology Integration Services, Family Office Exchange

Catherine Garner, Head of Technology, Walton Enterprises

Robert Gray, Assistant Vice President, Enterprise Operations and Executive Security, Cox Enterprises, Inc.

Jonathan Tunner, Director, Private Investment Opportunities, Family Office Exchange

Kyle Yost, Finance Manager, Rock Ventures LLC

FOX's Kent Lawson will moderate a discussion on how family offices are incorporating automation to free resources for higher value add activities, leveraging data to make more informed decisions, partnering with third-parties to fill non-core capabilities, and ensuring it is all done with proper cybersecurity protocols to protect family data.

11:30 am **Break**

Monday, September 21, 2020 *continued…*

11:45 am **Peer Dialogues**

Meet directly with similarly sized offices to share best practices in changing approaches to tech, talent, and teaming.

Small Family Offices (1-6 employees)

Medium Family Offices (7-14 employees)

Large Family Offices (15+ employees)

Multi-Family Offices and other Advisors

12:30 pm **Day 1 Concludes**

Family Office Exchange | 30 YEARS

2020 FOX Family Office Forum™
AGENDA

Tuesday, September 22, 2020

10:00 am **Welcome and Introductions**

Gaby Griffin, Market Leader, Business Owners and Family Executives, Family Office Exchange

10:10 am **Spot and Manage Talent in the New Paradigm**

Moderator: Peter Leo, Director, Human Capital, Family Office Exchange

Cassie Atteberry, Principal, Talent Outside the Lines

Neil Kreuzberger, President and Founder, Kreuzberger Associates, LLC

Covid-19 has changed all the rules. The familiar guideposts and benchmarks are now moving targets. Will being virtual help or hinder finding talent? How about retaining it? Is work from home a temporary or permanent condition? Our panel discussion will feature insights from experts who've faced down these challenging questions.

11:05 am **Break**

11:15 am **Breakout Sessions**

Results from FOX's 2020 Compensation & Benefits Survey, sponsored by Grant Thornton

Cassie Atteberry, Principal, Talent Outside the Lines
Ken Cameron, Director, Grant Thornton LLP
Glen W. Johnson, Chief Operating Officer, Family Office Exchange
Rob Storrick, Manager, Human Capital Services, Grant Thornton LLP

Find out what we learned about current family office compensation and benefits practices, including how Covid-19 has affected office structures.

Managing Under Covid-19

Arden O'Connor, CEO, O'Connor Professional Group
Katherine Richardson, SVP Chief Human Resources Officer, PURE Insurance
Ruth Easterling, Managing Director, Member Services, Family Office Exchange

Discuss how you're supporting employees and family members during Covid-19, including mental health, education, and work-from-home policies.

Improving Quality Through Family Office as a Service

Rob Mallernee, CPA, CFA, Chief Executive Officer & System Designer, Eton Solutions, L.P.: Founder and CEO, Eton Advisors Group, LLC
Karen Rush, Managing Director, Membership, Family Office Exchange

Learn how process mapping can help firms improve quality of their client deliverables, operations, efficiency, and expenses.

Driving Efficiencies with Technology

Kent Lawson, Director, Technology Integration Services, Family Office Exchange
Scott Winget, Market Leader, Enterprise Families, Family Office Exchange

Family offices are increasingly leveraging tools to drive efficiency in the office, such as call scheduling, business intelligence, and client relationship management systems.

12:05 pm **Day 2 Concludes**

12:05 – 1:05pm ***Forum Sponsor virtual exhibit room, featuring Addepar, is open in the event portal***

A.O. 9.21.20

2020 FOX Family Office Forum™
AGENDA

Wednesday, September 23, 2020

10:00 am **Welcome and Introductions**

Karen Rush, Managing Director, Membership, Family Office Exchange

10:10 am **2020 Trust and Estate Update**

Mark Harder, Partner, Warner Norcross & Judd LLP

Jamie Sanders, Partner, Tax, Private Client Services, RSM

Don't miss this perennial Family Office Forum classic. It doesn't take a crystal ball to know 2020 will usher in tax and estate planning change. The pandemic has disrupted the economy and interest rates, offering new opportunities for wealth transfer planning. Learn what you can do now and should do by the end of the year.

11:00 am **Break**

11:10 am **Delivering Value Through a Trusted Advisor Ecosystem**

David Toth, Managing Director, Family Office Exchange

Katherine Dunlevie, Managing Director and Executive Vice President, The Family Office at Synovus

Mindy Kalinowski Earley CMP, CFBA, Chief Learning Officer, Family Office Exchange

Lisel Morris, Branding, Strategic Projects Manager, AMS Hospitality

Jonathan Tunner, Director, Private Investment Opportunities

Rising family expectations paired with greater complexity have accelerated the need to work more closely with teams of advisors. It has become increasingly challenging to deliver against the breadth and depth of services family members require. Learn from three different family office situations about the value of trusted experts and how to partner to achieve the greatest value and success. In this session we'll also explore how to build family and MFO partnerships that have long-term sustained value, what great direct investment partnerships look like and how to find them, and how to create a family educational ecosystem of experts and resources.

12:00 pm **Closing Remarks**

12:15 pm **Forum Concludes**