

Tuesday, July 28, 2020

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All times are in Central Time

**10:00 am**      **Welcome****Bill Sullivan, President, Family Office Exchange**

*FOX is committed to identifying technology trends and issues that will impact family offices over the next decade. In this Showcase FOX will support its members in staying current on latest technology and bringing leading technology providers to you virtually. These firms will tell us how they make decisions about future direction for their products, which will give us insight into the future of integrated technology.*

**10:10 am**      **Preparing to Embrace New Technologies in the Modern World****Peter Boumgarden, Professor of Practice Strategy and Organizations, Olin Business School at Washington University, St. Louis**

*Embracing technological change and doing so in a way that drives competitive advantage is difficult. It requires that firms understand which changes are most critical to their core business, how such changes generate strategic opportunity, and finally, how to move with greater agility in these directions when the time is right. In the following session, Dr. Peter Boumgarden from Washington University in St. Louis (Olin Business School) walks through a particular set of research-informed ways in which family enterprises and wealth owners, in particular, might be able to navigate this landscape with greater agility.*

**10:30 am**      **Technology Panel Discussion: Planning for Tomorrow's Technology Today****Diana Ermini, Director of Financial Services Vertical, Sage Intacct****Ryan Kerry, CEO, KnowLedger****Mary Timmons, Chief Operating Officer, Global Family and Private Investment Offices Group, Northern Trust****Moderator: Erin Hulse, Owner, Deviate Consulting**

*FOX has brought together multiple service providers to highlight their direction and strategies. Gain insights into how different technology is building to work together and discover how this change in direction empowers family offices to select technologies and solve unique challenges.*

**11:00 am**      **Break**

**Tuesday, July 28, 2020** *Continued...*

**11:15 am**      **Technology Demonstration – EstateSpace**  
*25 minute demonstration with 10 minute Q&A*

[estate-space.com](https://www.estate-space.com)

**11:50 am**      **Peer Dialogues**

**Family Office Dialogues:**

- **1 to 6 year offices**
- **7 to 15 year offices**
- **16 to 30 year offices**
- **Over 30 year offices**

**Advisor Peer Dialogue**

**12:30 pm**      **Day 1 Concludes**

Wednesday, July 29, 2020

10:00 am **Opening Day 2**

**Kent Lawson, FOX Technology Advisor, Family Office Exchange**

10:10 am **Attendee Survey on the Tech Goals for Your Family Office**

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

**Kent Lawson, FOX Technology Advisor, Family Office Exchange**

*FOX's 2019 Benchmarking study showed us a new path that family offices are beginning to take, and so we want to understand the challenges and long-term goals that our members are dealing with. This participation session using Mentimeter Surveys is meant to help us to discover and talk about the current technology needs within FOX member offices. As FOX works to build a technology marketplace, understanding the frustrations and concerns in our community will help to direct how to best support our members.*

10:35 am **Addepar - With a Brand-New Chief Technology Officer Taking the Helm, What Shifts in the Tech Stack will Addepar Follow?**

**Ruchir Swarup, CTO, Addepar**

*Long-time BlackRock executive, Ruchir Swarup, has joined Addepar as the new CTO, filling the 6-year vacant position. How will Addepar's strategic plans change given this significant change to the organization? Will these changes coincide with the family offices using or targeting Addepar as a possible solution?*

10:50 am **Break**

11:00 am **Technology Demonstrations – Session One**

*25 minute demonstration with 10 minute Q&A and 10 minute peer dialogue*



11:45 am **Break**

12:00 pm **Technology Demonstrations – Session Two**

*25 minute demonstration with 10 minute Q&A and 10 minute peer dialogue*



12:45 pm **Break**

1:00 pm **Technology and Data Dialogues**

- **Software Platforms**
- **Data Analysis and Reporting**
- **Family Collaboration Platforms**
- **Cybersecurity**

1:45 pm **Day 2 Concludes**

Thursday, July 30, 2020

10:00 am **Opening Day 3**

**Kent Lawson, FOX Technology Advisor, Family Office Exchange**

10:10 am **SEI - Relentless Development: What Comes Next for SEI's Archway Platform<sup>SM</sup>**

**Paul Freeland, Head of Sales & Service, SEI Family Office Services**

*Originally designed to address the pervasive accounting and reporting issues faced by family partnerships and funds, the Archway Platform has seen its share of evolution. Two decades later and powered by a Relentless Development Philosophy (RDP), our platform forged the path for today's landscape of family office accounting and investment reporting solutions, evolving to meet ever-changing expectations set into motion by the shifting needs of our family office clients, generational wealth transfers, changes in economic policy and technology innovation. So what comes next in the evolution of SEI Family Office Services and the Archway Platform? Join Paul Freeland as he discusses our path to innovation, our plans for the future and how we continue to move forward for our client community.*

10:25 am **Remarks**

10:30 am **Mastro – Leading Technology Trends in Family Enterprise Transformation**

**Padman Perumal, Chief Executive Officer, Mastro Americas**

*Having Been Described as a Next-Generation Platform that Includes Machine Learning, Artificial Intelligence and Advancements in Cybersecurity, What Technology Trends does Mastro See for the Next 5 Years? Mastro has stated they will help advance the industry with new capabilities that offer greater automation and efficiency and increased client privacy and confidentiality for family offices. From Mastro's innovative lens, which advancements will be the leading technology trends in family enterprise transformation? How will these changes benefit family offices? And how should family offices plan for these changes?*

10:45 am **Remarks**

**Bill Sullivan, President, Family Office Exchange**

10:50 am **Break**

11:00 am **Technology Demonstrations – Session Three**

*25 minute demonstration with 10 minute Q&A and 10 minute peer dialogue*



11:45 am **Break**

12:00 pm **Technology Demonstrations – Session Four**

*25 minute demonstration with 10 minute Q&A and 10 minute peer dialogue*



12:45 pm **Showcase Concludes**