2020 FOX Virtual Wealth Advisor Forum™
AGENDA

Tuesday, June 23, 2020

Login to the event portal at https://event.crowdcompass.com/waf2020

All times are in Central Time

10:00 am **Welcome and What's on the Minds of Members**

Bill Sullivan, President, Family Office Exchange

Identifying the trends and issues with an immediate impact on families of wealth is a large part of our mission at FOX. To kick off the Forum, we'll explore what's top-of-mind for members right now.

10:10 am **The Future of Wealth Management Technology**

Doug Fritz, CEO, F2 Strategy

In this keynote session, a tenured wealth management chief technology officer will address the widening gap between ultra-wealthy clients' expectations and the actual value delivered. We'll discuss how firms successfully innovate and work differently to adapt to evolving client needs and will provide insights from our family office membership. Additionally, we'll explore the complex wealth advisor ecosystem and why finding the right partnership can be a game changer.

11:00 am **Break**

11:05 am **The Evolving Role of the Wealth Advisor**

Thomas P. Melcher, Managing Director, Director of Family Wealth, Glenmede

Jack Thurman, Managing Partner, BKD Family Office

John Zimmerman, President, Ascent Private Capital Management of U.S. Bank

David Toth, Managing Director, Family Office Exchange

Moderated by FOX's David Toth, we'll hear from three prominent wealth advisors regarding the advisor role, how they see the role evolving, the technology influencing what they do and how they do it, and the skill sets they seek in the next advisor generation.

11:55 am **Q&A and Wrap-Up**

12:00 pm **Day 1 Concludes**

Wednesday, June 24, 2020

10:00 am **Introduction to Day 2**

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

10:05 am **Business Development in the Age of Digital Privacy and Personalization**

Milton Pedraza, Chief Executive Officer, Luxury Institute, LLC

During and post pandemic affluent consumers of all generations will work remotely more often, enabling them to become more digital, and generating more personal data, than ever before. Milton Pedraza, Luxury Institute CEO, shares insights and recommendations on how human emotional intelligence optimized with innovations in advanced personalization through privileged access to personal data, powered by AI, can be implemented to achieve high-performance client relationship building today, and beyond.

10:55 am **Break**

11:00 am **Best Practices for Virtual Client Engagement**

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

Amy E. Szostak, Senior Vice President, Director, Family Education and Governance, Northern Trust

Jaclyn Webb, Family Learning and Events Manager, Walton Enterprises

Karen Rush, Managing Director, Membership, Family Office Exchange

With almost all meetings now happening virtually, how are firms establishing and growing client relationships? Demonstrating your firm's capabilities, better understanding client needs, maximizing touchpoints, and building deeper client relationships are all important client engagement goals. In this session, leading family learning and events professionals will share their successful strategies and activities to reinvent engagement activities, as well as tips and best practices to help you reinvigorate your own client engagement strategy.

11:50 am **Q&A and Wrap-Up**

12:00 pm **Day 2 Concludes**

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Thursday, June 25, 2020

Please note: Thursday's sessions begin at 11:00 am

11:00 am **Introduction to Day 3**

Scott Winget, Market Leader, Enterprise Families, Family Office Exchange

11:05 am **Resilience and Growth in Disruptive Times**

Nicholas Petrie, Author
Work Without Stress: Building a Resilient Mindset for Lasting Success

How we think and feel impacts our health, decision making and actions. Learn from 30 years of research on how people react during times of adversity, and the most effective ways to cope and grow. You'll gain insight into your personal resilience profile and discover how you can help others deal with the demands of this challenging time. You'll learn:

- *How we react to disruptions affects stress levels*
- *The importance of resilience on our health*
- *Your own resilience profile assessment*
- *Four steps to decrease stress even in challenging times*
- *The power of adversity to promote growth for individuals and organizations*
- *The three stages of disruptive change and the key actions to take*

12:35 pm **Q&A and Wrap-Up**

12:40 pm **Forum Concludes**