**Family Advisor Training Program**

Hybrid event
April - June, 2024

This program will equip wealth advisors and family office professionals with the qualitative skills needed to meet the demands of increasingly complex client relationships.

Through a unique inside-out-approach, you will work on self-discovery and develop self-mastery to improve how you effectively engage with others – both your clients and your team.

| | |
|---|---|
| **April 24** | 90-minute virtual |
| **May 8** | 90-minute virtual |
| **May 15–16** | 2-day in-person intensive |
| **June 26** | 90-minute virtual |

FOX Family Office Exchange

### What to expect

A paced learning approach with a cohort of peer advisors and family office professionals that begins with two virtual prep sessions, followed by a two day in-person intensive learning program, and concludes with a virtual application and accountability session.

### Key takeaways

- Learn to adapt your communication style to build trust and long-term relationships
- Understand emotional intelligence to effectively navigate relationships
- Develop an understanding of the stages of organizational change and the impact
- Understand how families evolve on their journey with diversity and complexity
- Develop a comprehensive understanding on how to communicate with, develop and prepare the rising generation
- Cultivate fundamental coaching skills with the client and improve team engagement

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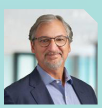
### Presenters



**Jeff Strese**
Family Learning and Leadership Consultant, FOX

**Mindy Kalinowski Earley, CMP, CFBA**
Chief Learning Officer, FOX

**Allison Lawshe**
Learning Center Program Manager, FOX

APRIL 24
90-MINUTE
VIRTUAL

**COHORT LAUNCH**

Meet Your Cohort → Program Overview & Expectations → Introduction to Style Inventory

MAY 8
90-MINUTE
VIRTUAL

**STYLE INVENTORY INTERPRETATION**

Style Inventory Interpretation → Develop Cohort Learning Goals

MAY 15–16
2 DAY IN PERSON INTENSIVE

**DEVELOPING LEADERSHIP SKILLS**

Communication Styles & Emotional Intelligence → Team Leadership

**MANAGING CHANGE & TRANSITIONS**

Building Trust → Change Management

**FAMILY DYNAMICS & ENGAGEMENT**

Family Systems → The Evolution of Multi-generational Families → Rising Gen Development

JUNE 26
90-MINUTE
VIRTUAL

**APPLICATION & ACCOUNTABILITY SESSION**

Cohort Reconnection → Personal Development Plan Updates → Problem Solving & Action Planning

## Who Should Attend

Registration is open to advisors and family office professionals with recurring interaction with families involving complex issues, such as family dynamics, rising gen prep, and succession planning. Advisors with an appetite to develop their own self-mastery as an aspiring or current team leader will also benefit from this program.

## To register and learn more

To To see the full agenda and register, visit us online at **familyoffice.com/FATP2024** or contact your relationship manager. For questions, please contact us at **events@familyoffice.com**. Registration closes April 18th.

**Register by April 5th to receive $300 off of your registration fee.**

| | Member | Non-Member |
|---|---|---|
| Individual attendee | US $5,850 | US $7,350 |
| Multiple attendees from the same family or firm | US $5,250 | US $6,650 |

*Up to 10.5 CPE credits can be earned by attending this event. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures, and acceptance may vary by state. Please visit the forum website for additional information.

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## Program courses

**Cohort Launch (Virtual: April 24)**
In addition to meeting your cohort, this first virtual session will provide a program overview, set expectations for the cohort learning model, and introduce the DiSC style inventory.

**Style Inventory Interpretation (Virtual: May 8)**
Complete the Everything DiSC to uncover your own effective communication style and inform how you communicate with, work with and lead others.

**Communication Styles & Emotional Intelligence (In-person: May 15)**
Gain an understanding of your own communication style to build client relationships and improve team dynamics.

**Family Systems (In-person: May 15)**
Understand the fundamentals of family systems and patterns related to communication, culture, relationships, and succession.

**Change Management (In-person: May 15)**
Develop an understanding of the stages of organizational change and the impact it has on families and organizations. Learn to navigate and guide clients through times of change.

**Rising Gen Development (In-person: May 15)**
Understand how to communicate with, develop and prepare the rising generation for ownership and leadership within the family enterprise.

**Building Trust (In-person: May 15)**
Gain skills needed to foster trust-building behaviors and consensus-building among family members to improve decision-making.

**The Evolution of Multi-generational Families (In-person: May 16)**
Understand how families evolve on their journey and how diversity and complexity impact each family enterprise. Learn 8 important questions to help families on their journey.

**Team Leadership (In-person: May 16)**
Develop fundamental understanding and practice coaching skills to effectively coordinate multi-disciplinary client teams and lay the groundwork for navigating family dynamics.

**Personal Development Plan (In-person: May 16)**
Prepare a personal development plan to translate learning into action after the program and strengthen accountability. Discuss progress towards your plan during the final virtual session.

**Application & Accountability (Virtual: June 26)**
Reconnect with your cohort to discuss progress towards your personal development plan, share learnings, and explore solutions to challenges you are facing.