

At Family Office Exchange (FOX), we deliver relevant insights and knowledge on the topics that matter to our global community of enterprise families, family office executives, private investors, and trusted advisors. Each published content in the online <u>FOX Library</u> aims to help the community be well informed, prepared, and armed with solutions and ideas that address their unique needs and interests. For your reference, we present the top contents (based on more than 8,100 member downloads from September 1, 2022 to September 21, 2023):

The Top 10 Thought Leadership by FOX

- 1. 2023 FOX Foresight
- 2. 2022 FOX Family Office Compensation & Benefits Survey (member, non-participant report)
- 3. FOX Guide to the Professional Family Office
- 4. Family Learning Handbook
- 5. 2023 Rising Gen Research Brief
- 6. 2021 State of the Family Office Industry
- 7. 2023 Technology in the Family Offices Study
- 8. <u>2020 FOX Family Office Compensation & Benefits Survey</u> (member, non-participant report)
- 9. <u>Importance of Family Learning: Developing Flourishing Families through Family Learning</u>
- 10. 2022 FOX Foresight: Tech Architecture for the Family Office of the Future

The Top 10 Advisor Thinking by FOX Members and Partners

- 1. <u>Family Office Answer Book: A Complete Guide for Family Office Executives</u> Plante Moran
- Final Rules Implementing the Corporate Transparency Act and their Effect on Trusts, Family Offices, and <u>Private Trust Companies</u> Holland & Knight (formerly Waller Lansden Dortch & Davis)
- 3. <u>Evolution of the Lender Structure: Deduction of Investment Management Fees</u> Holland & Knight (formerly Waller Lansden Dortch & Davis)
- 4. <u>The 2023 Global Family Office Compensation Benchmark Report</u> KPMG
- 5. <u>Turn Your Family Office into a Family Bank</u> Bank of America Private Bank
- 6. <u>Governance: Sample Investment Committee Charter for XYZ Family</u> Cambridge Associates
- 7. <u>Portfolio Construction: A Blueprint for Private Families</u> Cambridge Associates
- 8. <u>Investment Governance: Creating a Framework That Works for a Family</u> Cambridge Associates
- 9. <u>Family Office Direct Investing Report</u> William Blair & Company
- 10. <u>Family Directors: An Insider's Perspective from a Seven-Generation Family</u> Pitcairn



Family Journey

- <u>2023 Rising Gen Research Brief</u>
 Family Office Exchange
- The Family Office Industry Supports the Evolving Family Enterprise Family Office Exchange
- Building a Lasting Family Legacy in Asia: Values, Governance, and Policy Cambridge Associates
- <u>Redefining Wealth in Business Families</u> KPMG
- Family Values: Charting Your Future Baird
- ESG Strategy Can Sustain the Family Legacy Baird
- What Is a Family Vision and Why Do You Need One? Hawthorn, PNC Family Wealth

Family Life Stages

- <u>A Financial Checklist for Post-Graduates</u> Baird
- Ten Financial Moves to Make When Your Child Turns 18 Baird
- <u>The State of College Admissions in 2022</u> LogicPrep
- <u>7 Tips to Overcoming Prenup Paralysis</u> Truist
- <u>Beyond Budgeting</u> Truist



Family Governance

- <u>Successful Leadership Transitions in the Family Office</u> Family Office Exchange
- Succession Stories: Lessons Learned from Former Family Office CEOs Northern Trust
- Family Meeting Handbook
 BMO Family Office
- How to Talk with Your Family About Wealth Baird
- Family Governance: A Key to Maintaining Your Legacy Baird
- Should You Have a Family Constitution? Warner Norcross + Judd

Family Learning

- Family Learning Handbook Family Office Exchange
- Importance of Family Learning: Developing Flourishing Families through Family Learning Family Office Exchange
- Preparing the Rising Gen for Leadership Family Office Exchange
- Introduction to Investing Cambridge Associates
- Education in a Family Office: Strengthening the Family Legacy RSM US
- How to Teach Your Kids the Basics of Investing Ascent Private Capital Management of U.S. Bank
- How to Achieve a Successful Transition of Family Wealth HighView Asset Management
- Helping Your Children Prepare for an Inheritance Baird



Operating Businesses

- Boundaries That Matter: Managing Family Assets Outside the Family Business Family Office Exchange
- Secrets of Successful Business-Owning Families Northern Trust
- Global Employer Guide 2022
 K&L Gates
- Who Are the Guardians of Family Legacy? KPMG
- Recession or Not, Family Businesses Benefit from These Strategic and Tactical Tips Baker Tilly US
- Preparing Your Private Company for an Exit: A Board's Role Grant Thornton

Family Philanthropy

- <u>Thinking Strategically About Charitable Giving</u> William Blair & Company
- Philanthropic Purpose: Defining Your Motivations, Values, Principles, and Priorities National Center for Family Philanthropy
- Legacy in Family Philanthropy: A Modern Framework Workbook National Center for Family Philanthropy
- The Essentials of Good Governance: Fundamentals of Family Philanthropy National Center for Family Philanthropy
- <u>Philanthropy in Complex, Multi-Generational Families:</u> <u>Balancing Individual Preference with Collective Purpose</u> National Center for Family Philanthropy



Family Office

- <u>2023 FOX Foresight</u>
 Family Office Exchange
- FOX Guide to the Professional Family Office Family Office Exchange
- 2021 State of the Family Office Industry Family Office Exchange
- Family Office Answer Book: A Complete Guide for Family Office Executives Plante Moran
- Evolution of the Lender Structure: Deduction of Investment Management Fees Holland & Knight (formerly Waller Lansden Dortch & Davis)
- Turn Your Family Office into a Family Bank Bank of America Private Bank
- Keys to an Effective Family Office Governance Framework RSM US
- The Family Office Journey Toward Operational Excellence RSM US

Enterprise Governance

- Family Directors: An Insider's Perspective from a Seven-Generation Family Pitcairn
- Mission Statements for Families of Wealth: Identify the Values and Reap the Reward Truist
- How to Plan for Succession: Paving the Way for Continued Prosperity BDO
- How to Plan for Succession: Preserving, Protecting, and Passing on Wealth BDO
- <u>Get the Most from Your Board of Directors</u> BNY Mellon Wealth Management



Investment Management

- The Advantages of Family Capital for Direct Investing Family Office Exchange
- <u>Governance: Sample Investment Committee Charter for XYZ Family</u> Cambridge Associates
- Portfolio Construction: A Blueprint for Private Families Cambridge Associates
- Investment Governance: Creating a Framework That Works for a Family Cambridge Associates
- Family Office Direct Investing Report William Blair & Company
- <u>A Deeper Dive Investment Policy Statements for Families</u> HighView Asset Management

Wealth Management

- 2022 State of the Ultra-Wealth Business: Recharting the Course Family Office Exchange
- Determining the Right Price: A Wealth Management Cost Framework for Families Cambridge Associates
- <u>2023 Personal Tax Planning Update</u> Hemenway & Barnes
- The 2023 Tax Reference Guide William Blair & Company
- SECURE 2.0 Act: Key Takeaways Affecting Retirement Plans Greensfelder, Hemker & Gale
- Year-End Tax Planning Strategies to Consider Before 2023
 BMO Family Office



Trust and Estate Planning

- Ten Minute Interview: How to Mitigate Trustee Liability Foley & Lardner
- Excellent Opportunity: The Modern Dynasty Trust/Family Bank South Dakota Trust Company
- Jurisdiction Comparison for Wealth Transfer Planning Willow Street Group
- The Basics of Estate Planning Baker Tilly US
- Top 4 Mistakes Family Trustees Make Warner Norcross + Judd

Lifestyle Services

- Managing Risk in Household Employment TEAM Risk Management Strategies
- Shared Ownership of Family Cottages, Part One: Does It Make Sense to Pass the Cottage to Future Generations
 Warner Norcross + Judd
- How to Protect Your Wine Chubb Personal Risk Services
- <u>Getting Smart About Moving Your Art</u> Chubb Personal Risk Services
- <u>Regulatory Trends Impacting Household Employment</u> TEAM Risk Management Strategies



Human Capital

- 2022 FOX Family Office Compensation & Benefits Survey (member, non-participant report) Family Office Exchange
- <u>2020 FOX Family Office Compensation & Benefits Survey</u> (member, non-participant report) Family Office Exchange
- The 2023 Global Family Office Compensation Benchmark Report KPMG
- Executive Compensation: Equity Compensation Continuum Baker Tilly US
- The Talent Trifecta: Recruiting and Retaining the Right Single Family Office Employees Pitcairn
- <u>Compensation Committee Priorities for 2023</u> BDO
- New Data, New Trends: What You Need to Know About Employee Engagement in 2023 Rehmann

Tax and Accounting

- Financial Services Accounting Software Buyer's Checklist Sage Intacct
- Estimated Taxes for Individuals: The Who, What, Where, When, and Why Baker Tilly US
- <u>The Hidden Costs of QuickBooks</u> Sage Intacct
- <u>Safety Tips for Sending Money with Zelle®</u> Hawthorn, PNC Family Wealth
- <u>Buyer's Guide to Accounting and Financial Management Software</u> Sage Intacct



Technology

- 2023 Technology in the Family Offices Study Family Office Exchange
- 2022 FOX Foresight: Tech Architecture for the Family Office of the Future Family Office Exchange
- Enterprise-Level Operations for a Family Office Eton Solutions
- <u>3 Trends to Build an Innovative Family Office</u> Entole
- IP Lawyer vs. ChatGPT: Top 10 Legal Issues of Using Generative AI at Work Foley & Lardner
- My Employees Are Using ChatGPT. What Now? Foley & Lardner
- The New Family Office 5.0 Model: A Flexible Solution for the Evolution of the Family Business Plante Moran

Risk Management

- Final Rules Implementing the Corporate Transparency Act and their Effect on Trusts, Family Offices, and Private Trust Companies
 Holland & Knight (formerly Waller Lansden Dortch & Davis)
- FinCEN Issues Final Rule on Beneficial Ownership Reporting Under the Corporate Transparency Act Perkins Coie
- <u>Cybersecurity: A Self-Defense Guide</u>
 William Blair & Company
- <u>Corporate Transparency Act:</u> <u>Identification of Individuals Who Exercise Substantial Control Over Reporting Companies</u> Kozusko Harris Duncan
- <u>Corporate Transparency Act:</u> <u>FinCEN Beneficial Owner Information Report Requires Street Address of Principal Place of Business</u> Kozusko Harris Duncan



Macro Trends

- Seven Technology Industry Predictions for 2023 BDO
- Inflationary Vortex: The Gravitational Pull of Labor, China, and Energy Wilmington Trust
- Implications and Aftermath of the Silicon Valley Bank BMO Family Office
- Taking Stock: Stagflation Trends NEPC
- Taking Stock: Recession Outlook NEPC

For more insights and thought leadership on topics devoted to the issues of most concern to the FOX community, please visit the online <u>FOX Library</u>.