

# FOX Family Office Technology Showcase

July 28-30, 2020 | A Virtual Experience

We are excited to announce our new **FOX Family Office Technology Showcase**. We have expanded the former Family Office Forum Technology Showcase into a three-day, standalone, virtual experience.

Learn about the latest technology disruptions and attend demos of family office software solutions from a variety of leading vendors. Explore the new ways they can help you improve office operations. And hear from the vendors about the bets they're placing on upcoming technology changes.

The FOX Family Office Technology Showcase is open to all members, with unlimited participation.

## Agenda at a Glance (All Times Central)

[Click to see full agenda](#) and [overviews of second and third days on next page](#).

### Tuesday, July 28

- 10:00 am Welcome**
- 10:10 am Preparing to Embrace New Technologies in the Modern World**  
Peter Boumgarden, Professor of Practice Strategy and Organizations at Washington University
- 10:30 am Technology Panel Discussion: Planning for Tomorrow's Technology Today**  
Featuring KnowLedger, Northern Trust, and Sage Intacct  
Moderated by Erin Hulse, Owner, Deviate Consulting
- 11:00 am Break**
- 11:15 am Technology Demonstration – EstateSpace**
- 11:50 am Family Office Peer Dialogues**  
1 to 6 year family offices, 7 to 15 year family offices, 16 to 30 year family offices, over 30 year family offices
- Advisor Peer Dialogue**
- 12:30 pm Day 1 Concludes**

There is no cost for FOX members to attend the FOX Family Office Technology Showcase. There is no limit on attendance per member firm. If you are not a member of Family Office Exchange, please contact [info@familyoffice.com](mailto:info@familyoffice.com) for membership information.

Click the logos below to learn more

### Premium Sponsors



### Standard Sponsor





## Agenda at a Glance (Continued or [click to see full agenda](#))

### Wednesday, July 29

- 10:00 am Opening Day 2**
- 10:10 am Attendee Survey on the Tech Goals for Your Family Office**
- 10:35 am Addepar** – With a Brand-New Chief Technology Officer Taking the Helm, What Shifts in the Tech Stack will Addepar Follow?
- 10:50 am Break**
- 11:00 am Technology Demonstrations – Session One**
- 11:45 am Break**
- 12:00 pm Technology Demonstrations – Session Two**
- 12:45 pm Break**
- 1:00 pm Technology and Data Dialogues**  
Software Platforms, Data Analysis and Reporting, Family Collaboration Platforms, and Cybersecurity
- 1:45 pm Day 2 Concludes**

### Thursday, July 30

- 10:00 am Opening Day 3**
- 10:10 am SEI** – Relentless Development: What Comes Next for SEI’s Archway Platform™
- 10:25 am Remarks**
- 10:30 am Mastro** – Leading Technology Trends in Family Enterprise Transformation
- 10:45 am Break**
- 11:00 am Technology Demonstrations – Session Three**
- 11:45 am Break**
- 12:00 pm Technology Demonstrations – Session Four**
- 12:45 pm Break**
- 1:00 pm Closing Comments**
- 1:30 pm Showcase Concludes**

## Registration Form (All registrations subject to approval by Family Office Exchange)

### How to Register

Advance registration is required. All attendees must register on-line, or submit this form by July 26, 2020 to participate.

Email: [events@familyoffice.com](mailto:events@familyoffice.com) Online: [familyoffice.com/TECH2020](http://familyoffice.com/TECH2020) Phone: [312.327.1221](tel:312.327.1221)

As part of the FOX Family Office Technology Showcase, FOX will utilize a mobile app, desktop portal, and attendee networking function that includes an attendee listing section, allowing attendees to contact each other during the Showcase. Within the attendee listing, your first and last name as submitted in your registration will be automatically visible to all FOX Family Office Technology Showcase attendees, unless you decline below.\*

I agree to my name appearing in the attendee listing.

I do NOT agree to my name appearing in the attendee listing.

### Registration Questions

What technology issues are at the forefront of your office today?

Are you the person who makes the technology purchase decisions?\*

Yes  No

Are you in the midst of technology changes today or planning a change yet this year? If so, what is the primary area of focus?

Investments  Accounting  Reporting  Other

In your opinion, what technology do you think will impact the private wealth management industry over the next 5-10 years?

FOX has gathered some of the key technology solutions for family offices to share their products, services, and direction in technology. If you could, please let us know the order of importance (rank 1-7) that these vendors represent for your office:

- |         |                |              |        |
|---------|----------------|--------------|--------|
| Addepar | EstateSpace    | KnowLedger   | Mastro |
| SEI     | Northern Trust | Sage Intacct |        |

### Attendee Information

\*Indicates a required field, and must be completed before submitting form via email.

Name (First/Last)\*

Name of Firm/Family Office\*

Title/Position\*

Street Address\*

City\*

State/Province\*

Country\*

Zip/Postal Code\*

Phone\*

E-mail\*