

Definition of the Peer Group

The FOX Family Enterprise Council is comprised of family leaders and trusted executives pursuing a long term view of their family enterprise.

Purpose of the Council

To elevate the professional and personal performance of these participants in order to enhance the operation of the broader family enterprise and long term well-being of the family.



INAUGURAL MEETING - AUGUST, 2014

“As a 10+ year member of FOX, I heartily recommend membership in one of the FOX councils as a way to enhance one’s membership experience. Participating has been a highlight of my FOX membership, and I greatly look forward to the meetings. Membership in a FOX council is a perfect way to get to know your closest peers and develop mutually beneficial relationships.”

–Council Member

What the Council Delivers

- Connection to a committed, highly qualified peer group where members talk strategically and share ideas, experiences, and challenges.
- The opportunity to gain insight, experience, and suggestions from the group to avoid re-inventing the wheel when facing an issue others have addressed before.
- Insights to allow the member to engage more effectively with their broader family group, board members, and family office staff.
- Professional and personal development experiences that are specific to the needs of this sophisticated Council group.
- Customized guidance on how other global families address matters such as wealth management education, family member engagement, succession planning, governance, and operating structures.
- Sample topics from recent Council meetings:
 - Developing a Long-Term View for the Family’s Wealth Strategy
 - Where Should Wealthy International Families Locate their Assets?
 - Council member on Functions of their Family Office
 - Looking for New Ways to Conduct Financial Reporting
 - Developing Future Family Leaders

FOX Family Enterprise Council™

The council membership comes with full benefits, focused for you in the two day and a half Council meetings each year.

Community

- Become part of a unique, hard to find network of successful family leadership; members join the Council by invitation only, with the commitment to attend all meetings and share openly with fellow Council members
- Interact with your peers during two highly customized 1.5-day meetings in Australia each year held in a private, confidential setting hosted by either FOX or a Council member
- Participate in the FOX Family Office Peer Group online discussion forum (listserv)
- Access the FDX Capital network for co-investing with fellow FOX members in family sponsored private equity opportunities
- Link younger family members with the FOX Next Gen Network
- Tap the resources of the National Center for Family Philanthropy (NCFP) member website and webinars
- Connect with the 400 other Family Office Exchange families at events and through introductions from your relationship manager

Advice

- Receive “on demand” guidance and access to solutions and resources through a dedicated senior relationship manager
- Work throughout the year towards attainment of your strategic goals for the family office via regular consultative calls and advice
- Participate in Family Office Benchmarking and access full CEO and Board reports, providing objective cost and services data for peer family offices

Knowledge

- Requisition custom research conducted by FOX to advance the work of the Council
- Partake in customized delivery of proprietary FOX content by FOX professionals at the Council meetings, tailored to meet the needs of top level executives
- Utilize the complete library of FOX proprietary family office and wealth management research
- Read our FOXConnects newsletter, published semi-monthly, with articles from best in class advisors, timely research from across the family wealth industry, FOX blogs, and updates on FOX events and research studies

Education

- Custom curriculum at each Council meeting that includes expert presentations by FOX and industry thought leaders
- Case studies by fellow Council members on operational and process best practices
- Unlimited participation in live FOX Webinars (20-24 per year, CE credit available) and unlimited access to replays
- Tracks at Forums for special interests in the areas of family office operations, investment strategy, family legacy and leadership, family business, and philanthropy

“You can’t find this level of conversation anywhere in the marketplace.”

–Council Member

“After 20 years of working in this industry, some key things you know to be true are the value of trusted relationships and the strength that comes from shared experiences and varied approaches to resolutions.”

–Council Member

For more information, contact
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