FOX
Trustees and Beneficiaries Workshop

Virtual Event
Jun. 5-6, 2024

This workshop is one of the very few places trustees and beneficiaries get the high-quality, objective, and non-commercial training they need to fulfill their roles in an informed and confident way.

This unique workshop is designed to help trustees and beneficiaries be better prepared and develop stronger relationships. The workshop covers the roles, risks and responsibilities of both trustees and beneficiaries so both trustees and beneficiaries are strongly encouraged to attend.

FOX Family Office Exchange

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WHO SHOULD ATTEND

Personal trustees serving as fiduciaries for family trusts and the beneficiaries of the family trusts.

SCHEDULE

All times listed are in U.S. Central Time and subject to change.

- Wednesday, June 5 | 10:00 am – 4:00 pm
- Thursday, June 6 | 10:00 am – 3:45 pm

To Register and Learn More

To see the full agenda and register, visit us online at **familyoffice.com/TB24** or contact your relationship manager. For questions, please contact us at **events@familyoffice.com**.

Register by May 24 to receive $300 off of your registration fee.

	MEMBER	NON-MEMBER
Individual Attendee	US $2,500	US $3,000
Multiple Attendees	US $2,250	US $2,700

AGENDA OVERVIEW

All times listed are in U.S. Central Time and subject to change.

WED, JUN. 5

10:00 AM
Welcome and Program Introduction

10:15 AM
Introduction to Trusts: Trust Structure, Trust Roles, Types of Trusts, and Desirable Trust Features

11:30 AM
Crash Course for Trustees and Beneficiaries: Responsibilities, Powers, Rights, and Wishes

12:30 PM Lunch Break

1:00 PM
Trustees and Beneficiaries – How Does it Really Work?

2:00 PM
Distribution Provisions: Understanding the Issues and Options

3:00 PM
From There to Here and Beyond: How to Spark an Education Program for Beneficiary Preparation

4:00 PM Day 1 Concludes

THURS, JUN. 6

10:00 AM
Introductions and Recap of Day 1

10:05 AM
Building Life-Enhancing Relationships with Beneficiaries

11:00 AM
Selecting the Right Trustee and Role of Trust Protectors within the Trust World

12:00 PM
Bringing it All Together – The Case Studies

1:00 PM Lunch Break

1:30 PM
Managing Fiduciary Risk

2:30 PM
Bringing it all together: Living in the Plan

3:30 PM Closing Remarks

3:45 PM Workshop Concludes

CPE Credit

Up to 10 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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