

Family Advisor Training Program

In-Person and
Virtual Modules
Aug. - Nov., 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.

Aug. 27	90-minute virtual
Sept. 10	90-minute virtual
Sept. 18–19	2-day in-person intensive
Nov. 5	90-minute virtual

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

Presenters



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



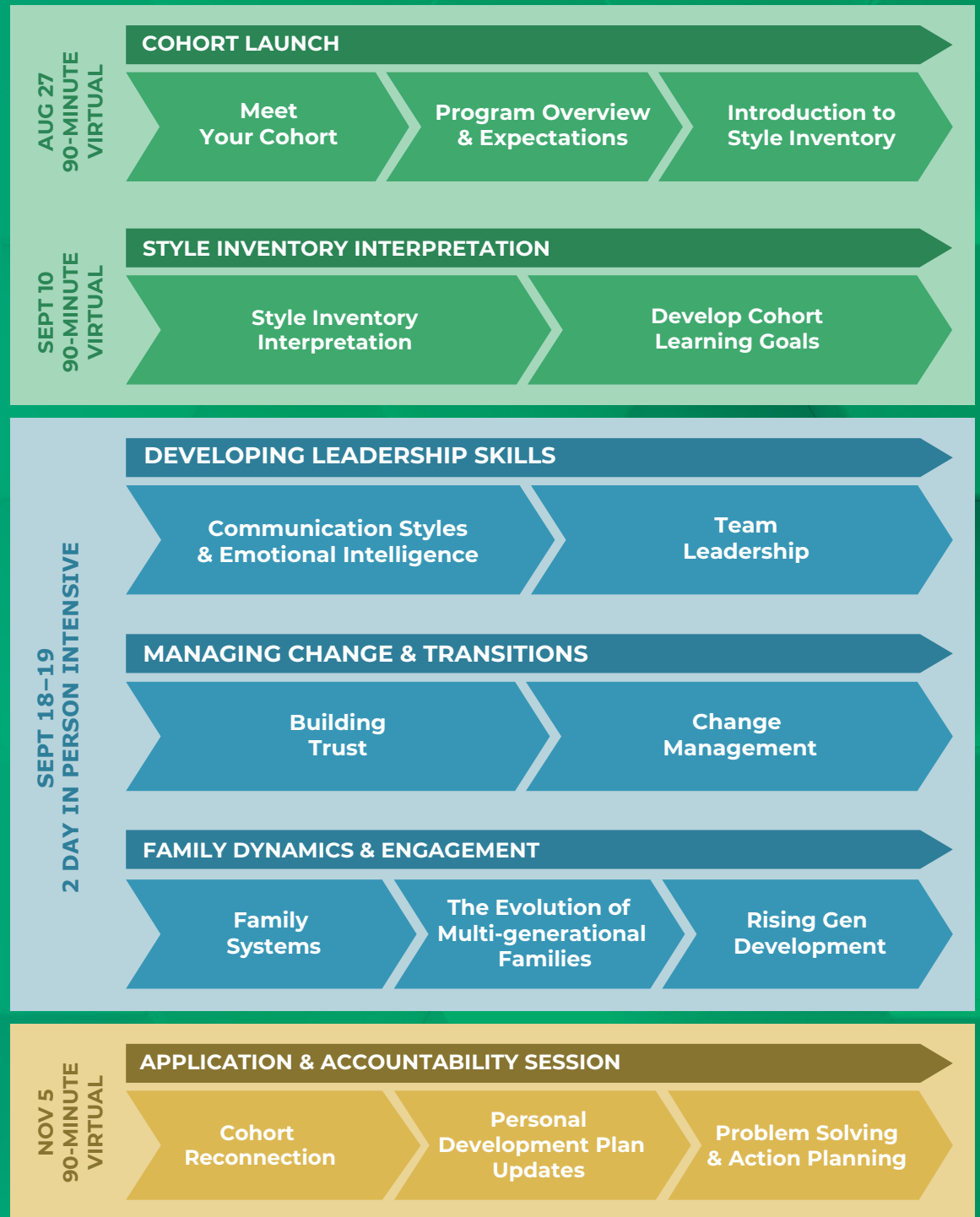
Stephanie Traversy
Vice President of Personal Development and Governance, Bridgegreen Capital



Allison Lawshe
Learning Center
Program Manager, FOX



Jeff Strese
Family Learning and
Leadership Consultant, FOX



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 see the full agenda and register, visit us online at familyoffice.com/FATP24 or contact your relationship manager. For questions, please contact us at events@familyoffice.com. Registration closes August 26th.

Register by August 2nd 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.



Program courses

Cohort Launch (Virtual: August 27)

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: September 10)

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: September 18)

Gain an understanding of your own communication style to build client relationships and improve team dynamics.

Family Systems (In-person: September 18)

Understand the fundamentals of family systems and patterns related to communication, culture, relationships, and succession.

Change Management (In-person: September 18)

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: September 18)

Understand how to communicate with, develop and prepare the rising generation for ownership and leadership within the family enterprise.

Building Trust (In-person: September 18)

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: September 19)

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: September 19)

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: September 19)

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: November 5)

Reconnect with your cohort to discuss progress towards your personal development plan, share learnings, and explore solutions to challenges you are facing.