

**FOX
Technology
Showcase**

Sept. 10-12, 2024
New Orleans, LA

**Hear from tech leaders
and visionaries in the
family office industry as
technology continues
to evolve at an
unprecedented pace.**

Connectivity, integration, and next-generation computing are driving changes those involved with family office operations and technologies need to know.

Experience demonstrations from leading vendors focused on family offices and wealth management.

“Great opportunity to network and get a pulse of what is in the market and related technology trends.”

– Past Attendee



Family
Office
Exchange

FOX Technology Showcase

Sept. 10-12, 2024
New Orleans, LA

Agenda

All times listed are in U.S. Central Time

Connect with peers and partners regarding solutions, including software and production, outsource and consulting services, and data providers that optimize general ledgers, investment/portfolio accounting, CRM, client portals, and other issues relevant to wealth owners and family offices.

MON, SEP 9

8:30 AM

OPTIONAL PRE-SHOWCASE TRAINING
FOX Technology Selection Workshop*
Join us in advance of the FOX Technology Showcase and learn how to best assess your technological needs, select the right systems, and effectively implement change in your office.

*fee required

6:30 PM

Technology Showcase
Welcome Reception
at the NOPSI Hotel



Family Office Exchange

TUE, SEP 10

8:00 AM

Breakfast, Registration, and Exhibit Opening

9:00 AM

Welcome and Partner Introduction

9:40 AM

Transforming a Family Office to Reimagine the Value it Delivers



10:25 AM

Technology Demonstrations



11:25 AM

Technology Demonstrations



12:10 PM **Luncheon**

12:50 PM

From Treasury to Technology: Revolutionizing Family Office Operations



1:35 PM

Appointment Rounds and Exhibits

3:10 PM

Technology Demonstrations



4:10 PM

Identifying New Investment Opportunities and Diversifying Portfolios to Manage Risk



5:00 PM

Technology Demonstrations



WED, SEP 11

8:00 AM

Breakfast, Registration, and Exhibit Opening

9:00 AM

Welcome

9:10 AM

SHOWCASE KEYNOTE SESSION
Create Change Through The "What If" Mindset

10:45 AM

Technology Demonstrations



11:45 AM

Technology Demonstrations



12:30 PM **Luncheon**

1:05 PM

Enhance Technology Integration Success Through Design Thinking



1:45 PM

Technology Demonstrations



3:05 PM

Best Practices and Practical Tips for Selecting Accounting/ERP Software



3:35 PM

The Evolution of Family Office Technology Selections



4:15 PM

Technology Demonstrations



5:00 PM

Exhibit Reception

THU, SEP 12

8:00 AM

Breakfast, Registration, and Exhibit Opening

9:00 AM

Welcome

9:15 AM

Scaling as You Evolve – The Next Step After Spreadsheets



10:00 AM

Technology Demonstrations



11:00 AM

Technology Demonstrations



11:55 AM

Showcase Closing Q&A

- All technology demonstrations are concurrent.
- 10-30 minutes breaks are scheduled throughout each day.
- Sign up at the showcase to join our partners for combined or separate dinners.
- Visit familyoffice.com/TSC24 for registration information.

WHO SHOULD ATTEND

This event is open to all FOX members as a benefit of your membership. Non-member consumers or buy-side professionals of the technologies presented are welcome to attend. Non-members must register for the program by Wednesday, September 4.

To register and learn more

To see the full agenda and register, visit familyoffice.com/TSC24 or at events@familyoffice.com.

	FOX MEMBERS	NON-MEMBERS
Regular Rate	US\$0	US\$199

VENUE AND ACCOMMODATIONS

NOPSI Hotel

17 Baronne St
New Orleans, LA, 70112

The FOX Technology Showcase will take place at the NOPSI Hotel, less than a 5-minute walk from Bourbon Street and the French Quarter.

FOX has reserved a limited number of rooms at the NOPSI Hotel, at a rate of \$169 per night plus applicable taxes. To obtain this discounted rate, please contact the NOPSI Hotel directly at (504) 962-6500 and mention the Family Office Exchange. You may also book rooms online by clicking [here](#).

Showcase attendees are responsible for making their own accommodation arrangements. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is August 19, 2024.



EXHIBITORS

Premier Partner



Executive Partners



Classic Partners



TECHNOLOGY SELECTION WORKSHOP

Join us in New Orleans September 9, in advance of the FOX Technology Showcase beginning September 10, and maximize your ability to ask the right questions and meet the right vendors.

Learn how to best assess your technological needs, select the right systems, and effectively implement change in your office. This workshop will be led by FOX's Kent Lawson, CTO, Consultant, and Subject Matter Expert on Family Office Technologies. Kent will be joined by a variety of thought leaders in the family office technology space.

To see the full agenda and register, visit us online at familyoffice.com/TSW24 or contact us at events@familyoffice.com.

	FOX MEMBERS	NON-MEMBERS
Regular Rate	US\$1,450	US\$1,800