EDUCATION

Family Advisor Training Program

Wealth advisors and family office professionals will be equipped 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.

Overview

Advisors and family office professionals are increasingly expected to not only have the technical and financial skills, but also the qualitative skills to help families navigate the complexities that come with wealth—family dynamics, engagement, change, and transitions.

A family is a system of members whose deep emotional connections can prevent them from objectively focusing on financial decisions, resulting in advisors needing to understand those dynamics to do their job.[1] Grubman, Jaffe, and Keffeler rightly call for a new approach and mindset in professional services, moving from a fear-based model to one that is strengths-based, leverages intrinsic motivation, and feeds engagement and resilience.[2]

The challenge of changing expectations is compounded with two demographic shifts the industry must contend with. First, the great wealth transfer will result in a new generation of clients seeking performance, personalization, and "human advice," in which advisors ask questions first and advise second.[3]

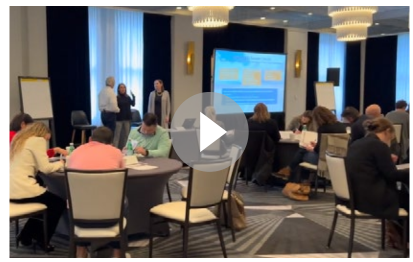
Second, a big wave of retirement in the advisor industry is creating a gap in finding mid-career talent, with one third of the wealth management workforce expected to retire in the next ten years.[4]

Who should attend

Ideal for advisors and family office professionals seeking to balance technical skills with qualitative skills to handle increasingly complex relationships, the demands of preparing the rising generation for the future, and navigating challenging family dynamics. Advisors with an appetite to develop their own self-mastery as an aspiring or current team leader will also benefit.

[1]Forbes, *Family Wealth Advisors Need Skills In Family Dynamics*; [2]*Wealth 3.0: From Fear to Engagement for Families and Advisors*; [3]Vise, *The 8 Step Playbook for Winning Millennial Clients*; [4]Deloitte, *10 Disruptive Trends in Wealth Management*

A deep and transformative learning experience



> Through this training, FOX has inspired me to be the best version of myself so that I can truly serve my clients well.
>
> - 2024 Attendee

> My colleague and I were blown away by the program. Of course, the content is high-level, but the truly unique component of this program is the ability to walk away with applicable skills. I have benefitted tremendously, both in my interactions with clients and colleagues.
>
> - 2024 Attendee

> Change management is a hot topic…the explanation of the organizational change cycle provided a better understanding of what it means to have bounded optimism in tough situations.
>
> - 2024 Attendee

This program will prepare you to face challenges head-on and develop you as a professional of the future.

Program design

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.

What to expect

- Learn to adapt your communication style to build trust and long-term relationships with clients and to lead your team.
- Understand emotional intelligence to effectively navigate professional relationships and the emotions of others.
- Cultivate fundamental coaching skills to effectively guide individuals and coordinate multi-disciplinary client and family office teams.
- Develop an understanding of the stages of organizational change and the impact it has on people.
- Develop a comprehensive understanding on how to develop and prepare the rising generation for ownership and leadership within the family enterprise.
- Connect qualitative skills with financial skills to move into a “coaching role” with the client.
- Understand the basics of family systems. Gain ability to effectively identify and navigate complex family relationships, including family decision-making systems and how they evolve over time.
- Build ability to foster trust-building behaviors among family members that improves decision-making.
- Curated resources and tools to manage your client relationships and advisory teams.

2025 Spring Program

90-minute virtual
April 29, 2025

2-day in-person
May 13-14, 2025
Chicago, IL

90-minute virtual
June 10, 2025

90-minute virtual
August 5, 2025

2025 Fall Program

90-minute virtual
September 16, 2025

2-day in-person
September 29-30, 2025
New York City, NY

90-minute virtual
November 4, 2025

90-minute virtual
December 2, 2025

COHORT LAUNCH AND STYLE INVENTORY INTRODUCTION

90-MINUTE VIRTUAL

- Meet Your Cohort
- Program Overview and Expectations
- Introduction to Style Inventory

DEVELOPING LEADERSHIP SKILLS

PART OF 2-DAY IN-PERSON

- Communication Styles and Emotional Intelligence
- Team Leadership

MANAGING CHANGE AND TRANSITIONS

PART OF 2-DAY IN-PERSON

- Building Trust
- Change Management

FAMILY DYNAMICS AND ENGAGEMENT

PART OF 2-DAY IN-PERSON

- Family Systems
- The Evolution of Multi-generational Families
- Rising Gen Development

APPLICATION AND ACCOUNTABILITY

90-MINUTE VIRTUAL

- Cohort Reconnection
- Personal Development Plan Updates
- Problem Solving and Action Planning

CONTENT REVIEW, CONNECTION, AND Q&A

90-MINUTE VIRTUAL

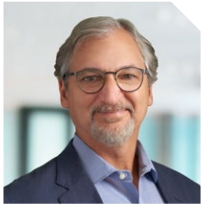
- Revisit Program Content
- Expand Your Network
- New Content Based On Needs

Field of study: specialized knowledge

Up to 10.5 CPE credits can be earned by attending this program. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures and acceptance may vary by state.

CPE credits

Family Office Exchange is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

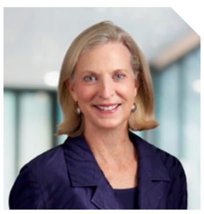


Jeff Strese | Family Learning and Leadership Consultant, FOX

Jeff is the Family Learning and Leadership Consultant for Family Office Exchange. In addition to his work at FOX, Jeff works with corporations, and mission-driven nonprofit organizations. He has more than 25 years of experience working across industries in the areas of leadership development, organizational effectiveness, and family dynamics. He holds certifications in family wealth and family business advising (CFWA, CFBA).

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

Mindy is Chief Learning Officer for Family Office Exchange. In her role, she leads the FOX Learning Center, fosters integrated learning programs for enterprise families, and is responsible for developing the family learning community. She co-chairs FOX's Rising Gen programming and serves as an outsourced Chief Learning Officer. In her consulting work, Mindy works closely with families and family offices to create learning programs, lead family meetings, facilitate multigenerational conversations, integrate the rising generation into family governance, and spearhead projects focused on family cohesion.



Sara Hamilton | FOX Founder and Family Advisor

Sara founded the Family Office Exchange (FOX) as a peer network for family office executives in 1989. Within 10 years, she could see that families needed help with family governance and managing financial transitions, in addition to their family offices. As a result, FOX evolved into an advisor to family enterprises, a platform for sharing family wealth best practices, and an industry advocate for the importance of private enterprise in a global economy. Today, Sara provides input to the strategic direction for FOX and supports the development of new programs and services for family enterprises and wealth advisory firms in 25 countries.

Allison Lawshe | Learning Center Program Manager

Allison is the Learning Center Program Manager at Family Office Exchange (FOX). In her role, she supports the design and delivery of learning programs, customized consulting projects, content creation, and thought leadership for families, family office staff, and advisors. She serves as the project manager for FOX Learning Center initiatives, as a key contributor to the Rising Gen Leadership Program and Family Advisor Training Program, and champions family learning and rising generation engagement.

Contact us

To learn more about this program, please contact Allison Lawshe at alawshe@familyoffice.com.

About FOX

Family Office Exchange (FOX) delivers the resources, connections, and knowledge that allow families to manage their enterprises and grow their wealth across generations. Founded in 1989, FOX was the first—and continues to be the industry-leading—membership organization that brings together families, family office executives, and their trusted advisors.

Since inception, FOX has worked with more than 2,000 families and advisors from around the world.