

Finding Your Leadership Opportunity

OCTOBER 21-22 | JW MARRIOTT | CHICAGO, IL

TAP SESSION TITLES BELOW TO NAVIGATE

SUNDAY, OCTOBER 21

- ▶ **Leading with Purpose: Bringing Meaning to Your Work**
- ▶ **The Generation of Impact: Using Your Voice for Change**

MONDAY, OCTOBER 22

- ▶ **The Benefits of Coaching for Leadership**
- ▶ **Leadership Storytelling: Bringing It All Together**

Agenda

Guest Presenters

FOX Staff

FOX Resources

Sunday, October 21, 2018

Forum Materials may be found online at www.familyoffice.com/RisingGenForum

Wireless Internet Access: **Network:** JWMarriott_Conference **Password:** FOX2018

All events occur on the second floor of the JW Marriott Chicago unless otherwise specified.

- 11:00 am Registration Opens** **Grand Foyer**
- 11:45 am Rising Gen Luncheon** **Grand B**
- 12:30 pm Opening Remarks** **Grand A**
Heather Abramson, Regional Director, Membership, West, Family Office Exchange
- 12:45 pm Leading with Purpose: Bringing Meaning to Your Work** **Grand A**
Arthur Woods, Co-Founder and COO, Imperative
Purpose-driven leaders tap into what really motivates both themselves and others, and as a result they inspire their teams to achieve extraordinary results. Leading with purpose is particularly important to millennials and rising generation leaders. We'll talk about the purpose economy, and participants will have an opportunity to discover their own Purpose Profile™ using an online assessment.
- 1:45 pm Purpose in Action** **Grand A**
Working in small groups, participants will identify their purpose priorities (work-related, philanthropic, family focused) and develop an action plan guided by their Purpose Profile™.
- 2:30 pm Networking Break** **Grand Foyer**
- 3:00 pm The Generation of Impact: Using Your Voice for Change** **Grand A**
Paulina Cromwell, CFA, Product Manager, Family Office Exchange
The Rising Generation has been called "The Generation of Impact," as we operate not only with a value-centric mindset but are insistent upon contributing to and seeing change. But how do we influence family leadership to think differently, and give us a seat at the table? In this interactive discussion, we will hear stories from peers who have been successful and explore how we can influence to make an impact.
- 4:00 pm Rising Gen Roundtables** **Grand A**
Participants will choose a topic and join in facilitated discussions with peers. Potential topics may include the following: Dynamics with the Family Business, Managing Generational Differences, Sibling/Cousin Concerns, Spouse/In-Law Involvement.
- 6:00 pm Rising Gen Dinner Reception** **12 S. Michigan Ave.**
Game Room at Chicago Athletic Association Hotel **Chicago, IL 60603**
This event is within walking distance from the JW Marriott.

• Agenda continues on next page •

Monday, October 22, 2018

- 7:00 am Rise and Shine Yoga**.....**Monroe, 3rd Floor**
 Start your day off right with a 45-minute refreshing and energizing yoga session. Join us for sun salutations and more. Wear comfortable clothes. Mats will be provided.
- 8:15 am Networking Breakfast**.....**Grand B**
- 9:00 am Opening Remarks**.....**Grand A**
- 9:05 am The Benefits of Coaching for Leadership**.....**Grand A**
Austin McDonald, President and COO, McDonald Development Company
Greg McCann, Founder and Principal, McCann & Associates
 Engaging a coach can be an effective way to develop your leadership, engage your teams, and accelerate your career development. In this interactive session we will explore your understanding of coaching as a mindset, a skill set, and a resource for Rising Generation family members. Coaching can help you unlock your leadership potential, whether it is through peer coaching or working with a professional coach.
- 10:30 am Networking Break**.....**Grand Foyer**
- 11:00 am Leadership Storytelling: Bringing it All Together**.....**Grand A**
Talli Sperry, Head of Family Office Segment, The Vanguard Group
Heather Winslow-Walker, Family Legacy Specialist, The Vanguard Group
 During our time together, we will discover how to bring meaning to our work, identify our own purpose priorities, and understand how to use our voice for change. This session provides an opportunity to bring together these essential building blocks to tell a powerful story about the impact we want to have on our families and the world. Being able to clearly articulate what you care about will set you apart as a creative and authentic leader who can leverage stories that engage and persuade.
- 12:00 pm Adjournment**



Greg McCann
Founder and Principal
McCann & Associates

Greg McCann is the founder, principal, and leader of McCann & Associates, a national family business consulting firm that create workshops, consults, publishes, and generally innovates on issues of importance to family enterprises. As an author, educator, coach, consultant, and speaker, Mr. McCann works with family enterprises in many areas within the context of vertical leadership development. He has coached leaders and executives for nearly 20 years and is certified in Leadership Agility and Myers-Briggs Type Indicator.

Mr. McCann is the founder of the Family Enterprise Center at Stetson University, where he led the effort as a professor to develop the nation's second minor and first under-graduate major in Family Enterprise. Mr. McCann wrote, *When Your Parents Sign the Paychecks*, that is a part of the Family Enterprise curriculum at Stetson University and has published a second book entitled, *Who Do You Think You Are? Aligning your Character and Reputation*.



Austin McDonald
President and Chief Operating Officer
McDonald Development Company

As president and chief operating officer for McDonald Development Company, Austin McDonald oversees daily activities related to financing, leasing, asset management, property management, and accounting. He maintains relationships with McDonald Development Company's investors and a broad range of financial institutions and is responsible for the company's development activities in the State of Florida. Mr. McDonald began his career at Carter and Associates, a full service regional real estate firm based in Atlanta where he coordinated development proforma analysis, property valuations, acquisition and dispositions, financing packages, and lease analysis.

Mr. McDonald graduated from Vanderbilt University with a Bachelor of Arts in Business Administration and Economics. He is active in Young Presidents Organization (YPO), National Association of Industrial and Office Properties (NAIOP), Society of Industrial and Office Realtors (SIOR), Atlanta Commercial Board of Realtors and the Urban Land Institute (ULI). He is a licensed real estate broker in the State of Georgia and a board member of the Atlanta Airport West and Atlanta Airport South Community Improvement Districts.



Talli Sperry
Head of Family Office Segment
The Vanguard Group

Talli Sperry began her Vanguard career in 2008, developing executive leadership programs, and has been supporting the needs of Vanguard clients since 2010. She has managed the Flagship client relationship teams since 2012 and also leads a team in Flagship Select™ and Vanguard's family office strategy group.

Prior to joining Vanguard, Ms. Sperry had a decade-long career in academia. She still teaches a graduate course in leadership and enjoys serving on various nonprofit boards.

Ms. Sperry holds her Series 7, 24, and 63 licenses. She earned an M.A. from Villanova University, as well as a B.F.A. from the University of the Arts and a graduate certificate in counseling from Westminster.



Heather Winslow-Walker, M.B.A., M.Ed., CPC
Family Legacy Specialist
The Vanguard Group

Heather Winslow-Walker is a family legacy coach in Vanguard's Flagship Services. In this work, Heather helps families plan the emotional legacy they want to leave their family including their values, stories, and traditions. This foundation compliments the financial planning process to ensure an integrated approach to family wealth planning.

Before joining Flagship in 2014, Ms. Winslow-Walker spent the majority of her eighteen years at Vanguard in Human Resources. She has an extensive education background which enables her to not only design educational programs but also facilitate group dynamics. Ms. Winslow-Walker's other specialties include leadership development, talent management, engagement, change management, and employee relations. In addition, she is a certified professional coach who coaches individuals to be aware of mindset as a mechanism to realize their full potential.

Ms. Winslow-Walker earned a bachelor's degree in psychology from the University of Pittsburgh. She holds two master's degree, an M.B.A., and M.Ed., both from Penn State. She received her professional coaching certification from the Institute of Professional Excellence in Coaching. She is currently completing her Heritage Design Professional certification through the Heritage Institute.



Arthur Woods
Co-Founder and COO
Imperative

Arthur Woods is a social entrepreneur named on the list for Forbes 30 Under 30, a keynote speaker and advisor to leading brands around the world on the ways we help people grow and realize their potential at work. He is the co-founder of Imperative, a breakthrough learning and development platform that has pioneered the way we measure and grow purpose within organizations. Imperative has powered the largest global research on purpose in the workplace, working with a wide range of organizations from LinkedIn and MetLife to Sony. Mr. Woods is a three-time TEDx speaker, World Economic Forum Global Shaper, a New York Venture Fellow, and sits on the Boards of the Georgetown Technology Alliance, Social Impact 360, and Out in Tech.

Mr. Woods came from Google where he led operations for YouTube's Education division and oversaw YouTube for Schools. He co-founded Social Impact 360, the leading collegiate social enterprise education program and co-founded Out in Tech, the largest global LGBTQ technology community. Mr. Woods studied Operations and information Management at Georgetown University and Project Management at Stanford University. He contributes to Fast Company's Purposeful CEO series.



Sara Hamilton
Founder and CEO
Family Office Exchange

Sara Hamilton is the founder and chief executive officer of Family Office Exchange (FOX). Sara is a recognized visionary and credited with professionalizing the family office industry. Sara founded FOX in 1989 as a peer network for family office executives. Within 10 years, FOX could see that families needed help with their enterprise vision, managing financial transitions, and educating family members on responsible ownership.

Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting family enterprises, family office executives, and wealth advisory firms in more than 27 countries. FOX has built a unique team of professionals serving multi-generational families, led by 15 technical experts who are supported by a dedicated team of 30 additional employees based in Chicago, New York, San Francisco, Sydney, and Madrid.

Sara is the co-author of *Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times*. She also serves on the executive education faculty of the University of Chicago Booth School of Business, where she is an adjunct faculty member for their Private Wealth Management course. She is on the founding boards for the International Private Directors Association and the Foundation for Gender Equality.



Heather Abramson
Regional Director, Membership, West
Family Office Exchange

Heather Abramson is the regional director of membership for Family Office Exchange (FOX). Heather has three major roles at FOX. First, she provides a variety of member services and supports the specific needs for family business-owning members. Secondly, Heather is a member of the FOX member development team and assesses the needs of prospective FOX members by helping them achieve their goals. Heather also runs FOX's Rising Gen Community, which is designed to provide next generation family members an opportunity to learn, share experiences, and develop skills as future leaders.

Before joining FOX in 2008, Heather served as strategic marketing and events manager at Aon Corporation. While at Aon, Heather planned and executed more than 100 large-scale events and created the marketing and project execution for Aon's South America Division. Earlier in her career, she worked on Capitol Hill for a U.S. senator and in the foreign policy department at a lobbying organization. She also has previous experience working in a Chicago-based family office.

Heather has a B.A. degree in journalism, public relations, and political science from the University of Wisconsin-Madison. She graduated with honors from DePaul University with an M.A. in organizational and multi-cultural communications.



Paulina Cromwell, CFA
Product Manager
Family Office Exchange

Paulina Cromwell is a product manager at Family Office Exchange (FOX). She is responsible for client education, advisory, and research related to Impact Investing & Philanthropy. Paulina cares deeply about helping families align their activities with their

values. She works with families to achieve their goals across the family enterprise, including charitable giving, impact investing, and business initiatives.

Prior to joining FOX, Paulina was a portfolio manager in the Family Office Investment Advisory Practice at Northern Trust. She worked with family offices and their foundations on investment strategy, asset allocation, portfolio construction, and manager selection. She also led the team that conceived Northern Trust's Family Office Consulting business. Paulina began her career in Corporate Strategy, focused on the company's M&A activities and the annual strategic plan with the Board of Directors.

Paulina received a B.S. Degree in Finance from Florida State University, with a Minor in History. She is a Chartered Financial Analyst® (C.F.A.) charterholder and a member of the C.F.A. Society Chicago. Paulina is also involved with several mentorship and financial coaching organizations throughout the Chicago area.



Nate Hamilton, CFA
Advisory Board Member
Family Office Exchange

Nate is currently co-founder and managing partner of Heritage Partners Group, a private equity investment and operations platform focused on the acquisition and roll-up of consumer retail and information services businesses. Nate has significant experience in partnering with and investing alongside private family capital and family-owned businesses.

Prior to founding Heritage, he worked in investment banking, sales and trading, and private equity across several institutions including Goldman Sachs, UBS, and as a co-founder of FDX Capital, a direct-investment platform built for FOX family offices. Nate currently sits on the Advisory Board of Family Office Exchange and is a consultant to the Direct Investment Network.

He earned his B.S. degree in Economics from Vanderbilt and an M.B.A. from the University of Chicago Booth School of Business.



Alexandre Monnier
President
Family Office Exchange

Alexandre Monnier is president of Family Office Exchange (FOX), a global organization that helps wealthy families and their advisors master the unique challenges inherent to wealth ownership. FOX's support includes networking, objective guidance, continuous learning on key topics such as managing wealth, family governance, legacy, succession, and best practices for running family offices.

He joined FOX from PinnacleCare, a leader in private health advisory services, where he led the development of the business in the U.S. and in Europe. Earlier Alexandre ran Skyjet, Bombardier Aerospace's private jet charter business, transforming the business from an emerging player to a leading private jet travel provider. Previously, Alexandre spent 10 years as a management consultant serving some of the most widely recognized firms in the U.S. and Europe on issues ranging from strategy to operational and organizational effectiveness. He started his career in finance with Societe Generale.

Alexandre is a graduate of ESCP Europe, one of Europe's leading business schools. He has been a member of Young Presidents' Organization since 2005.

Benefits of FOX Membership

Our goal is to provide you with a community for networking, objective guidance, and continuous learning.



Connect to the power of the community

- FOX provides an exclusive opportunity to engage with peers like yourself to gain insights into how other families are operating, what issues they are facing, and how they achieve success.
- You'll have the opportunity to network with other members in both small-group settings as well as at our large events, which combine peer discussions with top-quality programming to support learning.
- The community is always connected online with our 24/7 member discussion platform, FOXChat, and our Networks (Special Interest Groups).



Gain insights and guidance from your relationship manager

- Each member has a dedicated relationship manager who becomes familiar with your goals and challenges.
- Your relationship manager will guide and help address your needs by leveraging the multiple learning opportunities at FOX, our library of resources, introductions to other members and subject matter experts.
- Areas of expertise include: enterprise thinking, family governance, family learning, philanthropy, family office best practices, and investment strategy.



Access objective benchmarking and insights

- FOX provides the gold standard for benchmarking, best practices, and research, with a team of 15 full-time subject matter experts on staff who deliver the latest insights to you.
- As a pioneer in family office benchmarking, we offer awareness into how others are approaching structures, service offerings, investment management, as well as cost and compensation figures.



Stay informed about the latest issues and emerging trends

- In today's rapidly changing economic and geopolitical environment, FOX members stay informed in the moment with hot topic webinars, key industry speakers, and one-to-one personalized guidance.
- FOX is committed to visionary thought leadership that influences and shapes the industry.
- Ongoing updates of FOX Trends & Insights, our online library of articles, webinars, presentations, and videos.



Get tailored solutions with custom advisory services

- We provide strategic advice and practical solutions to families as they navigate the challenges of managing substantial business, financial, and human capital.
- Nearly 30 years of experience working with ultra-wealthy families, our consulting team brings expertise and an objective perspective.
- We design our engagements based on each family's objectives - whether through a custom-designed series of programs or a unique individual family process.



Connect to the Power of the Community



For additional information
about FOX membership,
contact us at:

info@familyoffice.com
or call 312-327-1247

FOX Rising Gen Network

The **FOX Rising Gen Network** is designed for next generation family members to help build a community where they can connect with people, like themselves, looking to engage in learning, share experiences, and develop skills as future leaders.



FOX members join the Rising Gen Network for robust peer-to-peer discussions – sharing experiences, asking questions, offering ideas and learning from others. The Network provides an exclusive and confidential space to connect with people who are facing similar opportunities and challenges.

Attributes of Network Members:

- Open to family members in their 20's, 30's and 40's
- Aspiring leaders within their family enterprises
- Willing to sharing challenges and opportunities with peers
- Desire to learn about family wealth and how it shapes and influences their own future
- Looking to expand their network and build lasting relationships

Benefits of Belonging:

- Join the online discussion board (FOXChat) to share questions, ideas and challenges
- Interact and engage when it's convenient for you with 24/7 access
- Access curated content to help enhance your learning, discovery, and building of leadership skills
- Stay informed about upcoming events and webinars
- Gain instant feedback on questions and requests

For more information about this Network, please contact
Heather Abramson at 312.327.1274 or email habramson@familyoffice.com.

Upcoming FOX Family Learning Workshops



FOX Family Office Design Workshop™ **November 14-15, 2018 in Chicago**

This comprehensive workshop addresses issues, both strategic and tactical, that family members and family office executives need to understand. Attendees will learn about governance structure and oversight of the family office, scope of services and delivery, talent and team structure, technology, costs, best practices, and measures of success.

2019 Dates

February 20-22 and June 12-14, 2019 | Locations TBD



FOX Family Enterprise Thinking Workshop™ **December 5-6, 2018 in Chicago**

This in-depth workshop will provide the tools to design and implement a vision and long-term plan for your family's future. Attendees will learn about developing a framework for their own family enterprise plan, a process for outlining critical action steps, and the key questions every enterprise must consider.

2019 Dates

June 10-12 and November 19-20, 2019 | Locations TBD



FOX Private Trust Company Fundamentals Workshop™ **February 6-7, 2019 | Location TBD**

Creating a Private Trust Company (PTC) is a time-tested strategy that provides a flexible structure to support families across generations, risk management, and fiduciary services. This workshop is ideal for families thinking about forming a PTC or in the early stages of developing a PTC. Attendees will learn the building blocks of why families select a PTC structure, what they need to consider in structuring the PTC, and how to incorporate the PTC into the broader family enterprise.

2019 FOX Learning Programs

FOX Forums



FOX Global Investment Forum™

March 13-14, 2019
New York



FOX Family Office Forum™

July 16-17, 2019
Chicago



FOX Wealth Advisor Forum™

May 1-2, 2019
Dallas



FOX Rising Gen

October 27-28, 2019
Chicago



FOX Rising Gen

May 19-20, 2019
Location TBA



30TH ANNIVERSARY

FOX Family Enterprise Forum™

October 28-30, 2019
Chicago

FOX Workshops



FOX Private Trust Company Workshop

February 6-7, 2019
Location TBA



FOX Family Enterprise Thinking

June 10-12, 2019 and November 19-20, 2019
Locations TBA



FOX Family Office Design Workshop

February 20-21, 2019
San Francisco
and June 12-14, 2019
Location TBA



FOX Trustees and Beneficiaries Workshop

Date and Location TBA



Leading with Purpose:

Bringing Meaning to Your Work

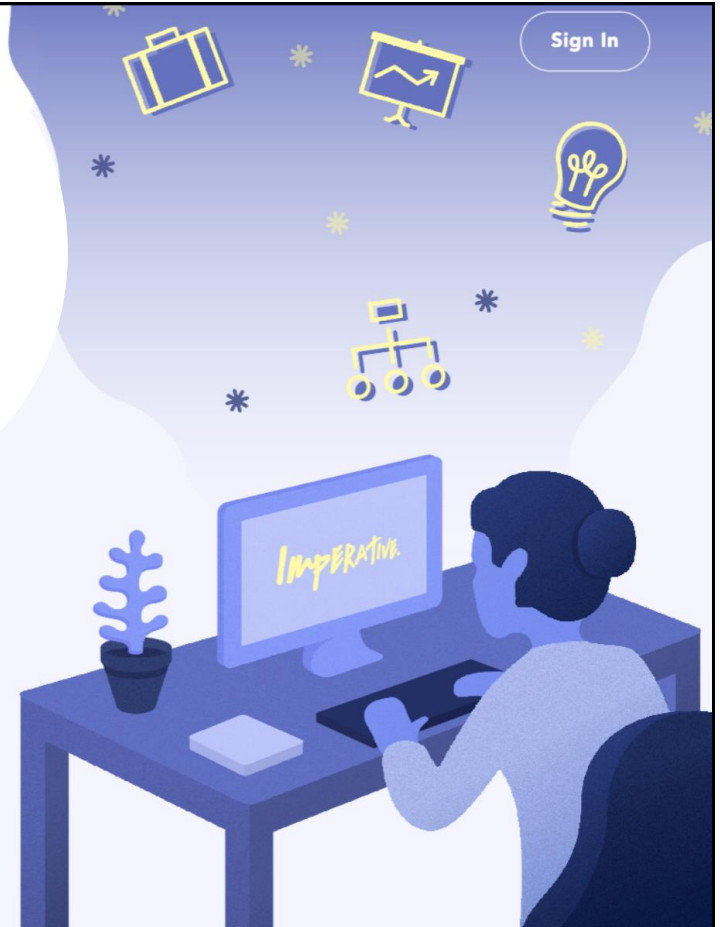
Arthur Woods, Co-Founder and COO, Imperative

October 21, 2018 | FOX Rising Gen Forum



IMPERATIVE.

Leading with Purpose: Bringing Meaning to Your Work





Purpose is...
Your personal 'Why'
Your North Star
How you Experience Meaning

Connecting to Purpose Leads to...



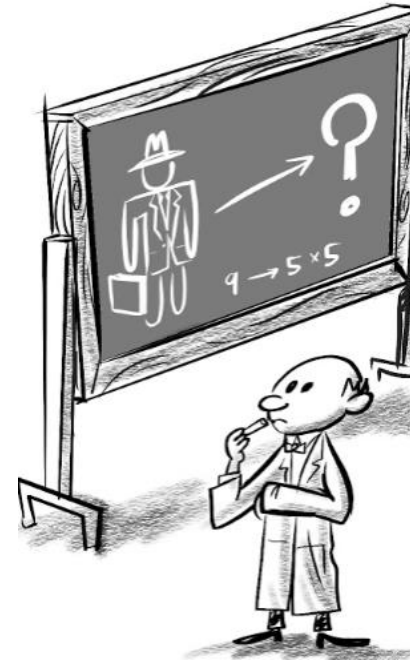
Twice the productivity



Significantly stronger relationships



Better health and less stress



IMPERATIVE.

Skills?



Strengths?



Purpose?



Observing Purpose

High Observability

Behavior

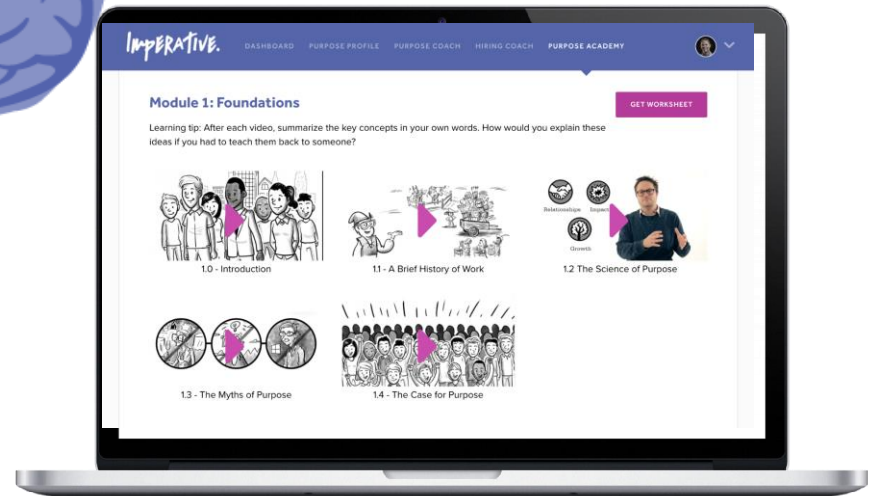
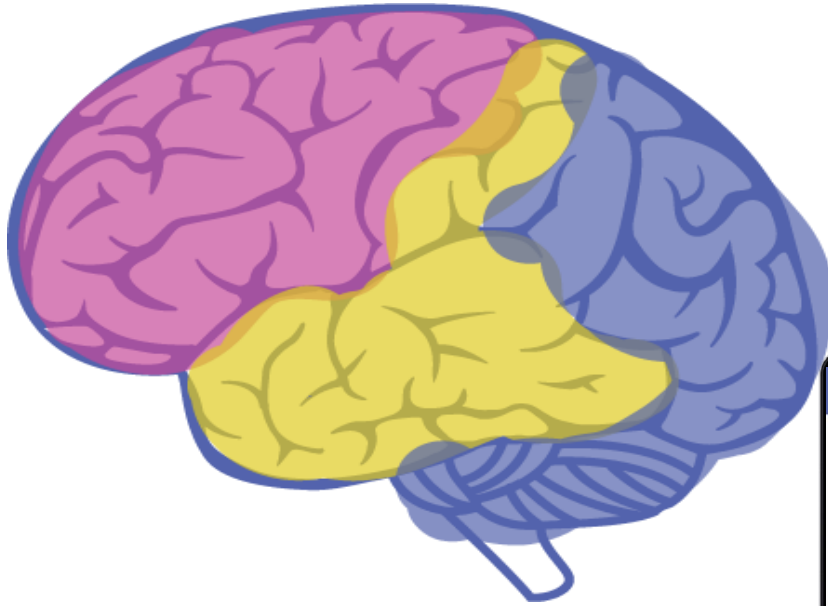
Personality

Talents

Purpose

High Importance





CRAFT

What is the primary way I want to
add value and solve problems?
How do I want to grow?

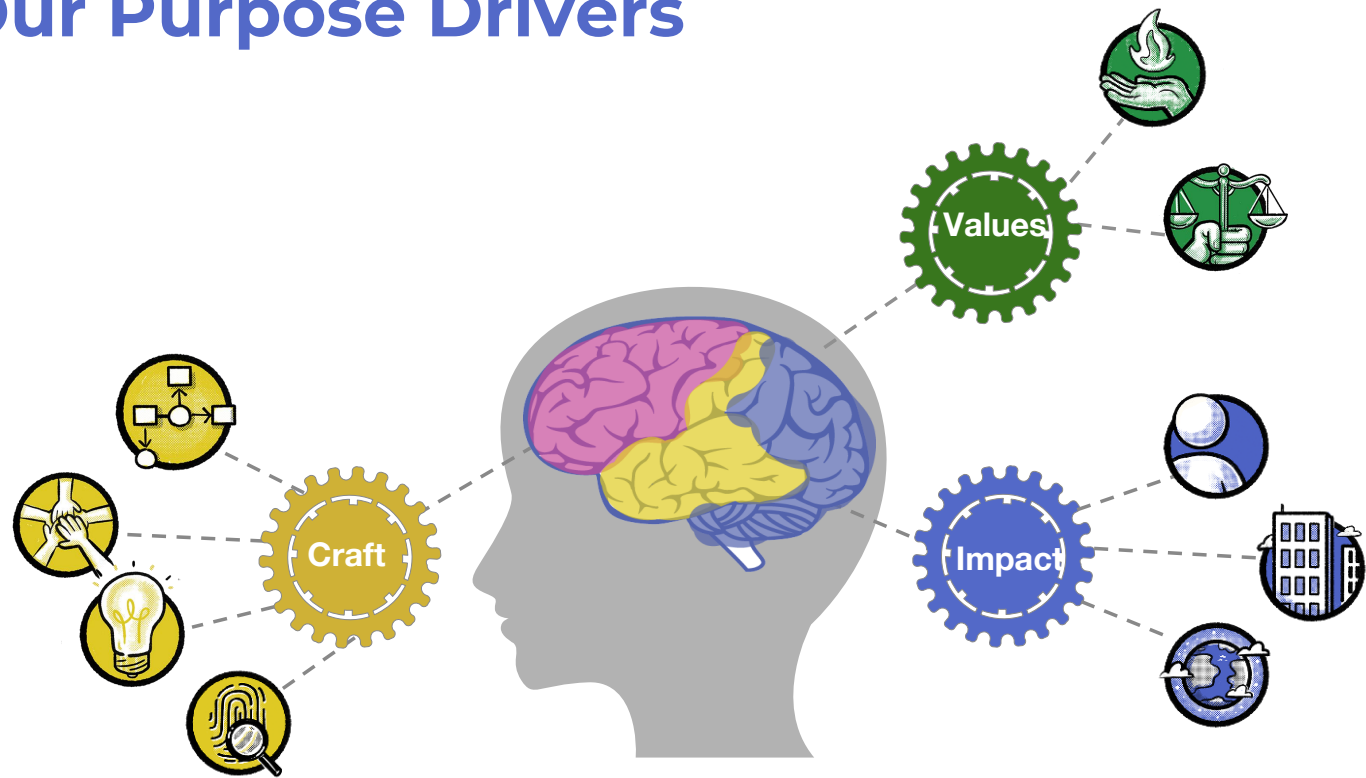
IMPACT

What impact do I want to make
in my career? How do I measure
my success?

VALUES

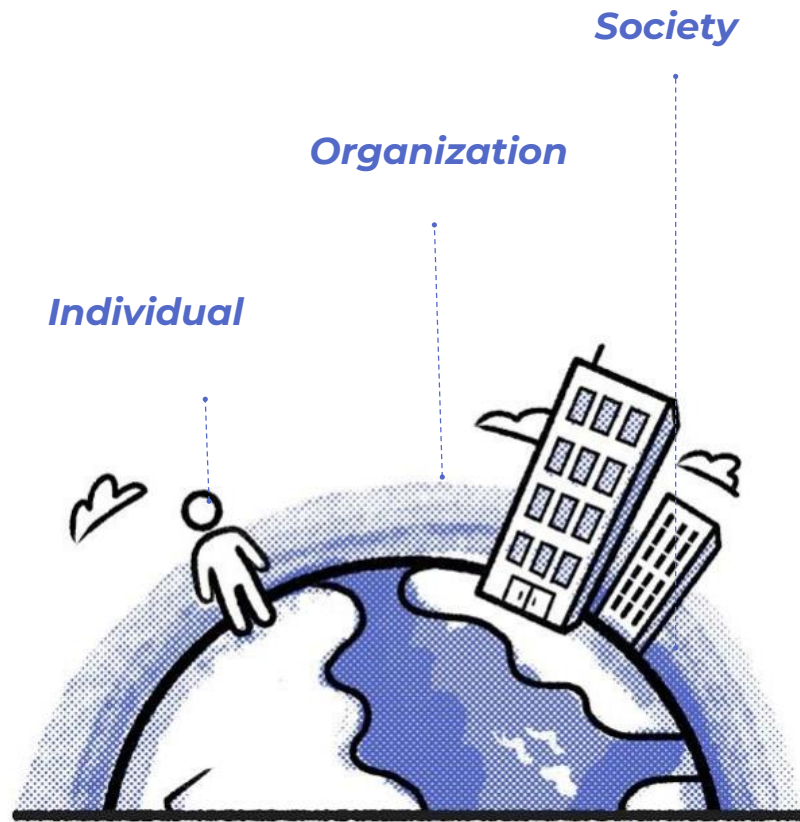
What is my worldview?
What do I stand for at my core?

Our Purpose Drivers

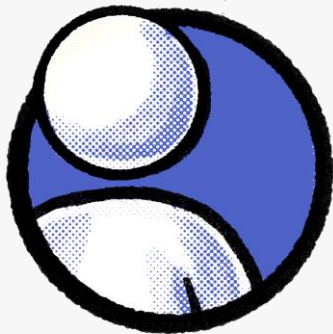


IMPACT

Who you serve



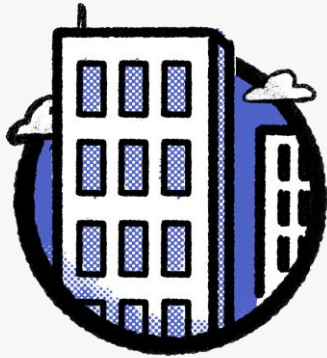
INDIVIDUAL



You love to impact the people served by your organization or family: customers, colleagues, grant recipients.

You celebrate the stories of how our work makes a difference for people.

ORGANIZATION



You love to impact teams and organizations through your work with your organization or family.

You celebrate when we work together as a team and when we make a difference as an organization.

SOCIETY

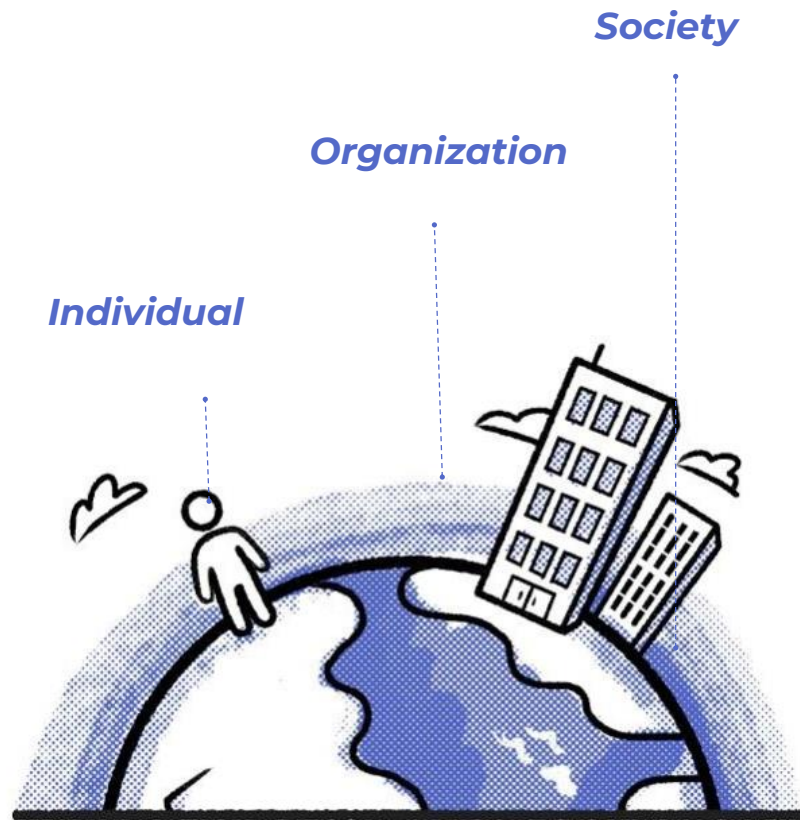


You love to make a broader impact in your organization or family and in our community.

You celebrate when do work that contributes to a bigger movement and makes change that you feel is long-lasting.

IMPACT

*Example in
Healthcare*



WHO:



Individual



Organization



Society

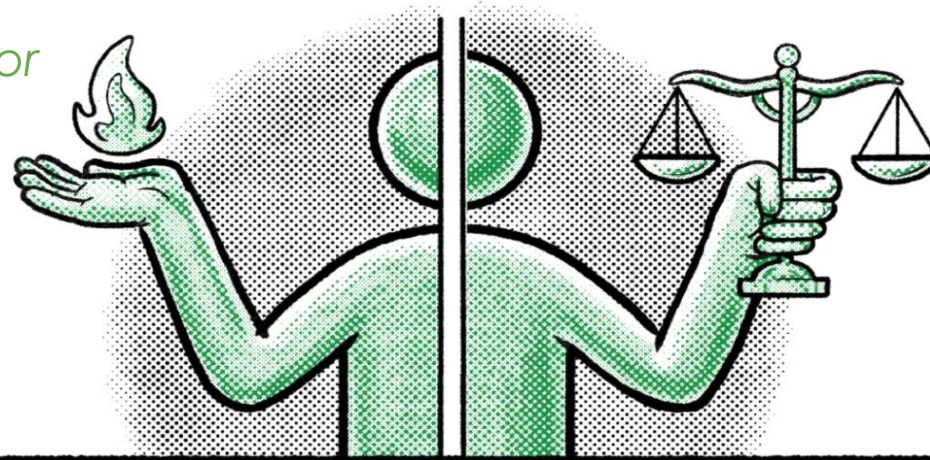
In Your Groups:

What early life experiences might have shaped and influenced this driver for you?

Where do you see this driver showing up in the work you are leading?

VALUES

What you stand for



KARMA

HARMONY

Progress, Liberty
Individual
Responsibility

THEY VIEW THE
WORLD THROUGH
THE LENS OF

Care
Collective
Responsibility

HARMONY



You are driven by the value of equality and believe we should care for each other.

You work to level the playing field, ensure everyone has access and a voice in our work.

KARMA



You are driven by the value of choice, and believe if we each put in effort we can see amazing results.

You work to drive progress and unearth opportunity in all that you do.

VALUES

Example as a manager



KARMA

HARMONY

Progress, Liberty
Individual
Responsibility

THEY VIEW THE
WORLD THROUGH
THE LENS OF

Care
Collective
Responsibility

WHY:



Karma



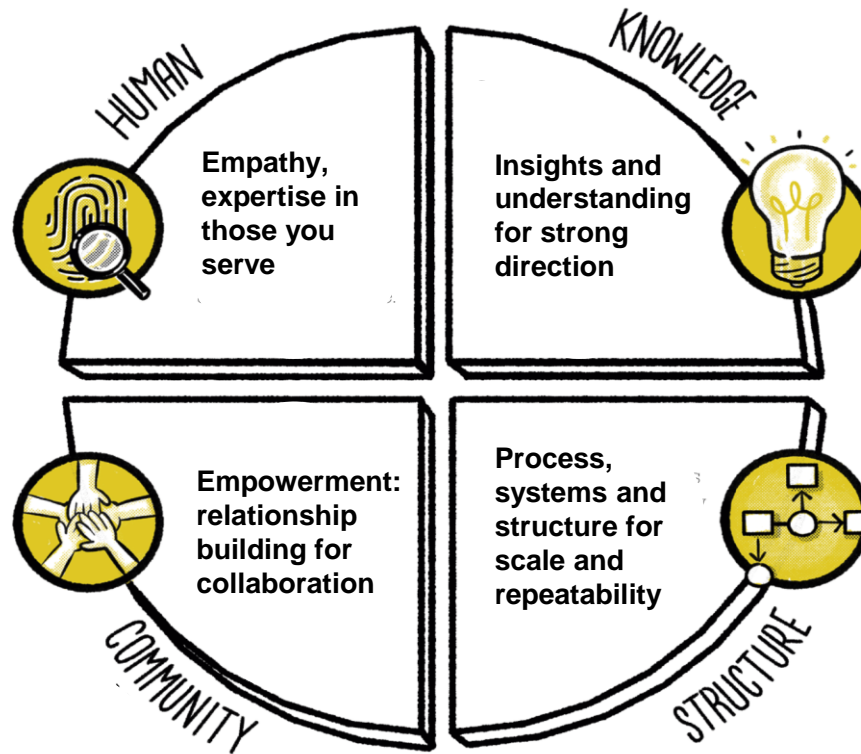
Harmony

In Your Groups:

What early life experiences might have shaped and influenced this driver for you?

Where do you see this driver showing up in the work you are leading?

CRAFT



HUMAN CENTERED



**You lead with empathy
and a deep understanding
of those we serve.**

*You become an expert in those
we serve and design authentic
solutions based on the needs you
recognize.*

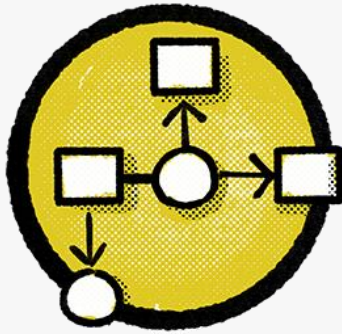
COMMUNITY ORIENTED



**You lead with relationships
and empowerment,
bringing people together
to solve problems.**

*You build relationships and strong
community to solve problems in a
collaborative fashion.*

STRUCTURE DRIVEN



You lead with process and scale by leveraging systems, tools and structures to solve problems.

You look at how we can scale our impact and you design the systems and processes to ensure our work is repeatable.

KNOWLEDGE ORIENTED

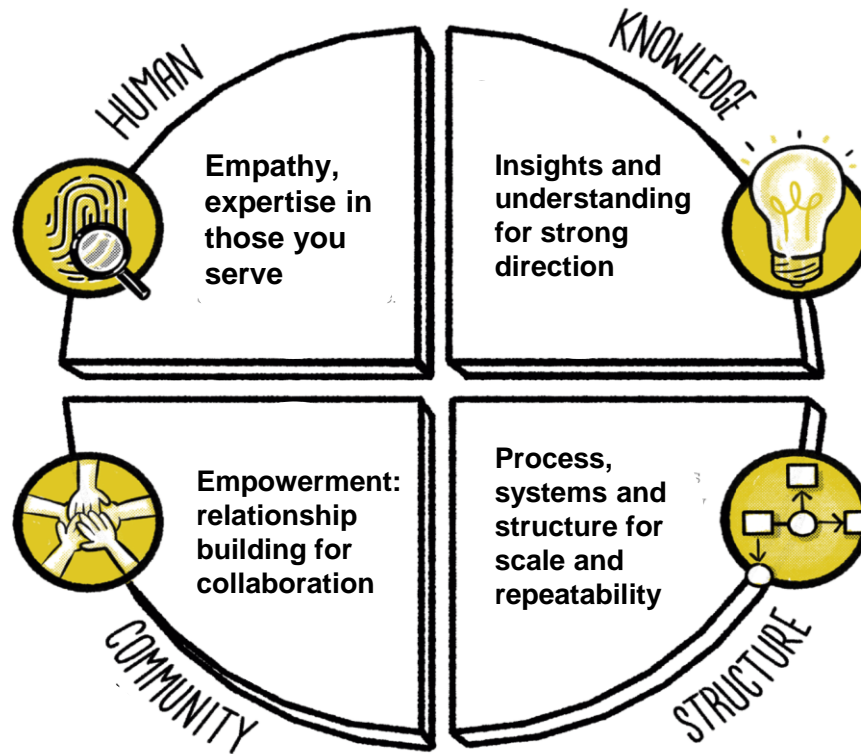


**You lead with insights
and understanding by
ensuring we have
direction in all that we
do.**

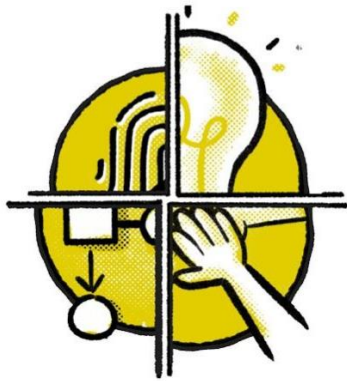
You help us advance our
knowledge and understanding of
an issue by uncovering insights
ensure our decisions are well
well-founded in fact

CRAFT

Example in
Education



HOW:



Human



Community



Structure



Knowledge

In Your Groups:

What early life experiences might have shaped and influenced this driver for you?

Where do you see this driver showing up in the work you are leading?

Developing Your Purpose Story and Statement



IMPERATIVE.

Person 1
Narrates

Person 2
Draws

15
Mins



15
Mins

Then Switch

Your Story



Your Personal Story

Parents
Divorced

Discovered
potential

Building
community
through work

Missing
purpose

Helping
Organizations
Drive Purpose





Your Personal Story

Parents
Divorced



Discovered
potential

Building
community
through work



Missing
purpose

Helping
Organizations
Drive Purpose



Your Purpose Statement



Your Purpose Statement

My Imperative is to...

WHO

help teams and organizations empower and realize the potential of their people by building a strong community around purpose.

WHY

HOW

My purpose is to empower communities to realize their potential.



1. Imperative Generated Statement

My purpose is to empower people and their teams to realize their potential and lead with courage in their work every day.

2. Long Form Statement (5 Minutes)

My PURPOSE is to empower people to act courageously.

3. Your Purpose Statement (5 Minutes)



**Share the draft
of your Purpose
Statement**



The Generation of Impact

Using Your Voice for Change

Paulina Cromwell, CFA, Product Manager, Knowledge Center

October 21, 2018 | FOX Rising Gen Forum



Goals for the Session

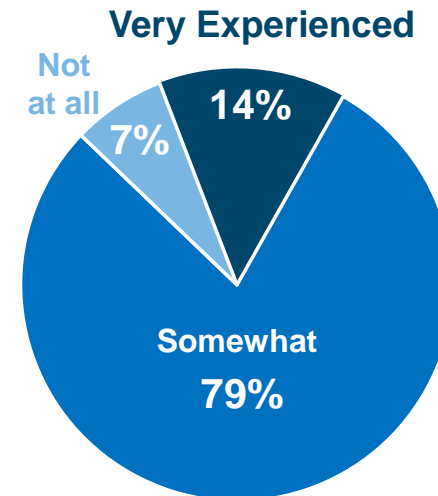
- ✓ Assess **current state** and **opportunity**
- ✓ Explore **framework** for maximizing impact
- ✓ Apply **concepts** to real-world situations



Where are we now?

From Our Last Forum

This group cares about and has experience with Philanthropy.



Significant Opportunity for Rising Gen

Nearly half of the wealth in flux has already been designated for philanthropy...

\$59 trillion wealth transfer



Significant Opportunity for Rising Gen

Nearly half of the wealth in flux has already been designated for philanthropy...

A solid green horizontal bar with a white border on the left side, containing the text '+ \$27 trillion' in white.

+ \$27 trillion

***\$400 Billion
in Family
Foundations***

...presenting the Rising Generation with an unprecedented opportunity to create positive change.

What Makes the Rising Gen Different?



Global



Digital



Now



Beyond the
checkbook



Collaboration



Social
entrepreneurship



How do we move forward?

Steps Forward

1. Understand yourself
2. Understand your family
3. Where do you overlap?

Understand Your Values

What changes do you want to see in the world?




What issues are you passionate about?

Understand Your Values

What are your motivations?

- **Heritage**
- **Family**
- **Legacy**
- **Faith**
- **Experience**
- **Analysis**

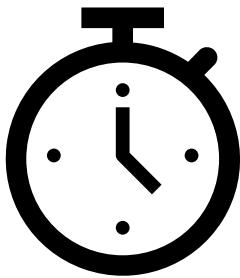
Understand Your Values

Motivators		Issues
Heritage		
Family		
Legacy		
Faith		
Experience		
Analysis		

Understand Your Resources

How can you help create the world you imagined?

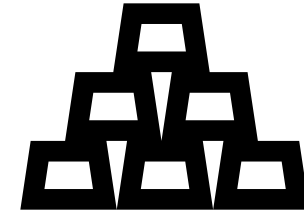
Time



Talent



Treasure

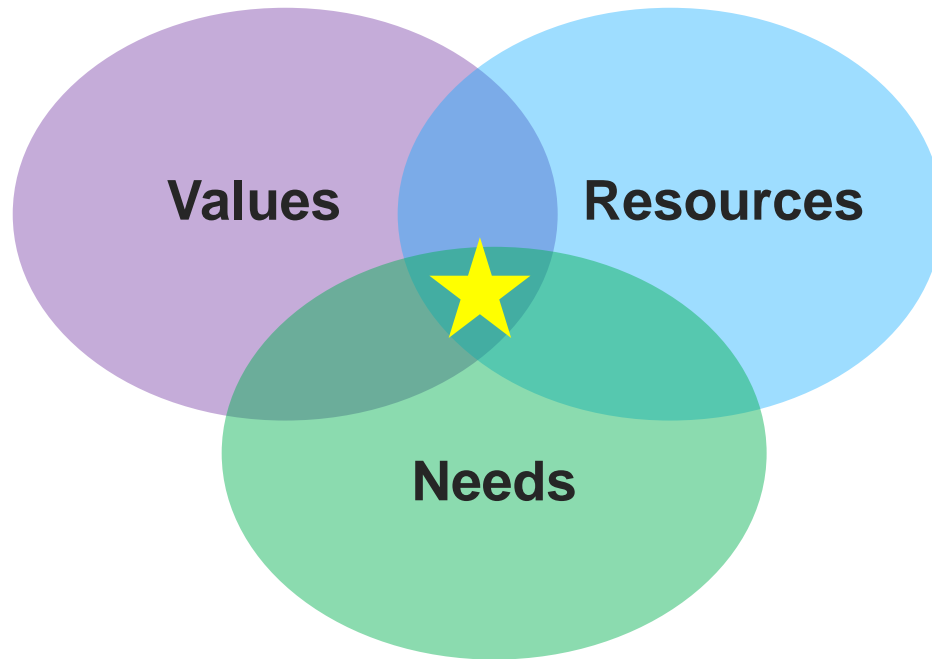


Understand Your Resources



Time	Talent	Treasure

Maximizing Impact



Understand Family Values

What drives the family's philanthropic engagement?

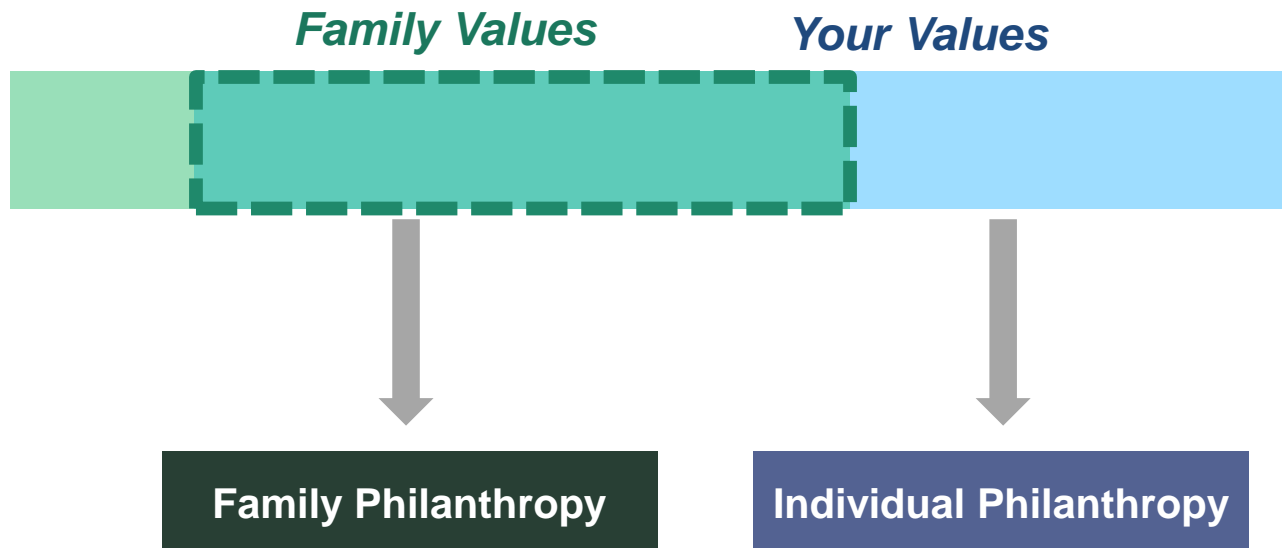
- **Family legacy**
- **Guiding principles**
- **Supported organizations**
- **Motivations**
- **Commonalities**

Understand Family Resources

How is the family currently positioned to support change?

- **Structure**
- **Defined purpose**
- **Decision-making**

Where Do You Align with the Family?



“WHERE YOUR **TALENTS** AND THE **NEEDS**
OF THE WORLD CROSS;
THERE LIES YOUR VOCATION.”

— ARISTOTLE



The Benefits of Coaching for Leadership

Austin McDonald, President and COO, McDonald Development Company

Greg McCann, Founder and Principal, McCann & Associates

October 22, 2018 | FOX Rising Gen



Objectives

- Understand what vertical leadership development means and how coaching can be an integral part of your leadership practice.
- Experience what a professional coaching session looks and *feels* like.
- Participate in a brief mindfulness meditation.
- Understand what coaching is and isn't. Learn to access it as a mindset and skill set as well as a resource in professional and peer coaching.
- Identify how to operationalize this experience into your role as a leader.

Why?

As a member of rising gen in a family enterprise, coaching can provide a safe & neutral setting to:

- Gain honest & rigorous feedback
- Rethink options & assumptions
- Own your strengths & navigate your weaknesses

Listening Exercise

The word
LISTEN
contains
the same letters
as the word
SILENT.

Most people do not
listen with the intent
to *understand*.
Most people listen
with the intent to
reply.

~ Stephen R. Covey

Sample Coaching Session



Awareness Changes Everything

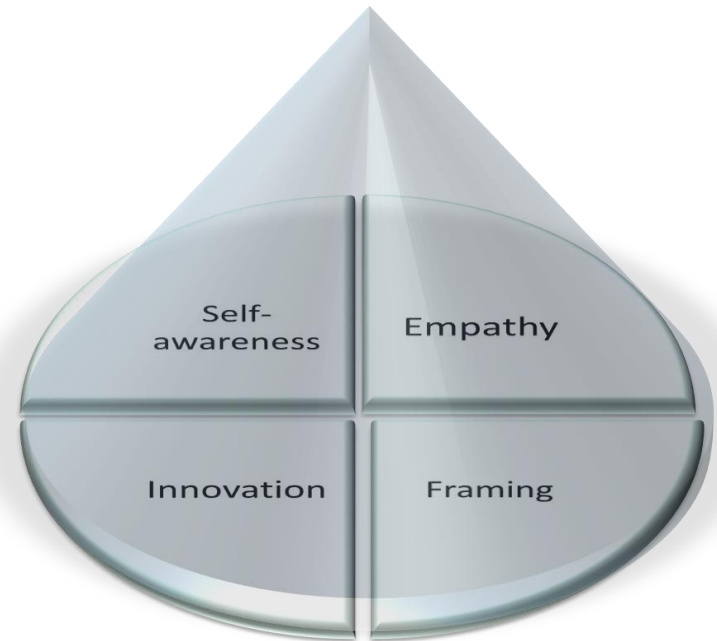


Increasing your awareness leads to more effective action!

Leadership Agility

The Four Agilities:

1. Self-Awareness - Able to have in-depth awareness of your emotions & manage them
2. Empathy - Able to deeply empathize with other stakeholders' perspectives, feelings & needs
3. Framing - Able to reframe an issue or problem in terms of stakeholders' interest, timing & strategy
4. Innovation - Able to transform change & problems into valuable results



Stages



Stages

Catalyst (about 5%)

- Mindset: post-heroic & developing a highly participative **culture**
- Deep reflection (in the moment) empathy, high self-awareness & framing
- Communication style: Balances advocating & accommodating

Achiever (about 35%)

- Mindset: outcome focused, **strategist** & hero
- More willing to engage & listen to people, growing reflection, empathy, self-awareness, framing & vision/strategy

Expert (about 45%)

- Mindset: **problem solver**, hero, smartest guy in the room
- Sees people as tools to achieve a solution, shows beginnings of reflection, empathy, self-awareness, framing & vision

How Austin & Greg Met



Questions a Good Coach Might Ask

1. Kick-start: What's on your mind?
2. AWE: And, what else?
3. Focus: What's the real challenge here for you?
4. Foundation: What do you want? (followed by) But what do you really want?
5. Lazy: How can I help?
6. Strategic: If you're saying yes to this, what are you saying no to?
7. Learning: What was most useful for you?

Make these 7 questions a habit, so they can help you “work less hard & have more impact”

The Coaching Habit Say Less, Ask More & Change the Way you Lead Forever Michael Bungay Stanier

Austin's Favorite Coaching Questions

1. What are our goals?
2. Are we in the right mindset to accomplish those goals?
3. How do we get the most out of the time we have together?
4. Are we properly organized & in the right roles to do that?
5. Does anyone need to use the bathroom before we start?
6. Did we have fun?

Do you think Austin uses these on the softball field, the office or both?

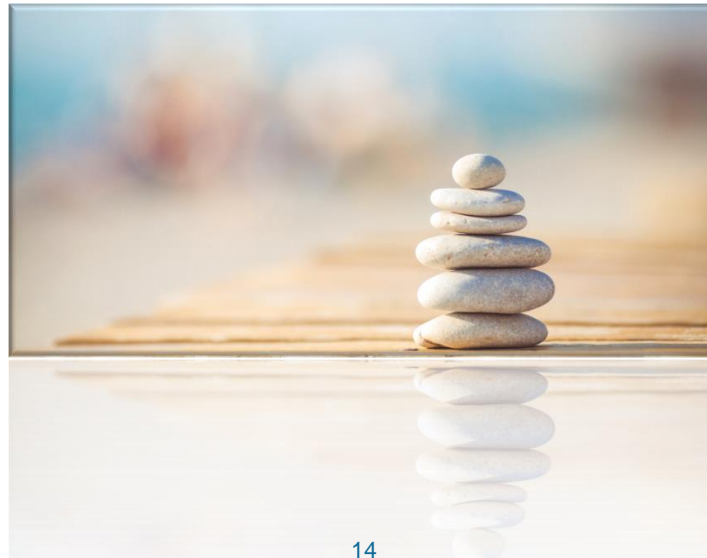
Greg's Favorite Coaching Questions

1. What would you need to if you knew the other person was never going to change?
2. Can we consider this situation from your head, from your heart, from your gut/intuition & (if appropriate for you) your soul?
3. What would you give yourself credit for?
4. What do you think this other person feels?
5. What is the next healthy risk to *consider* taking?
6. What is the discussion you have been avoiding, the praise you haven't given or the apology you haven't offered?

When people feel safe & heard they can do amazing things.  gregmccann
cultivating clarity™

Mindfulness Exercise

Research shows that meditation increases your empathy & changes your brain chemistry.



Coaching Exercise

For this exercise break up into groups of two with each person taking a turn as a coach & a coachee.

Be mindful of the proportion of feedback & support and remember to not give advice. Examine non-verbal communication, the level of curiosity & deep listening.

At the end of the session: Ask the coachee what they most benefited from?



Agree to keep this information confidential.

Coaching

Debrief—how did it go—feedback from the coaches, from the coachees?

Switch roles.

Debrief—how did it go—feedback from the coaches, from the coachees?

What can you take back to your personal or professional life?

Why Engage a Coach?

- Because you, not the coach, have the answer & get to define success
- To fix, solve, create, or plan something, personally or professionally
- To provide accountability & structure
- To develop, support & challenge
- When you want to stretch & own the decisions
- *To be more effective not just efficient!*

From Essential Coaching Tools by Coach U, Inc.

What is Coaching?

Deep listening

When people feel safe & heard they can get more honest, even vulnerable. This is when the shift happens, even a transformation. This is the greatest potential of coaching & the paradox is it often happens when the coach does little but pay attention (& challenge your assumptions).

Three gears

Feedback

Advice

Support

What is Coaching?

Is designed to focus more on process in a neutral setting

The coaching mindset means the coach is not here to solve the problem but to help you:

- Feel heard (empathy)
- Realize what you bring to the situation (self-awareness)
- Think how you might reconsider their perspective or options (framing)
- To come up with more effective attitudes, choices or actions (innovation)

What is Coaching?

How does coaching compare with therapy, consulting, mentoring & even teaching?

- Therapy is more focused on the past; helps address mental illness (e.g. depression, addiction, etc.).
- Consulting is charged with providing the answers to the client.
- Teaching is delivering information, occasionally developing skills, but seldom goes into the personal aspects of the student.
- Mentoring is someone guiding you as to what to do based on his or her experience & expertise.

Note: there can be overlap between these categories & any given professional may use some of the skill set of another profession. This is a broad analysis of differences.

Coaching Considerations

Be able to distinctly state what you expect from the relationship

Have an open discussion about goals & roles

Set aside time for check-in reviews

Agree upon the duration of the relationship

Adapted from Mentoring Tips for Success by Ramierz Benatti and Coach U materials

What to Look For in a Coach

A coach who asks similar questions such as:

- What's the biggest change you'd like to make in your life, assuming that you had enough support to do it right?
- What the first thing we would work on together if you hired me as your coach?
- What's the hesitation about getting started?
- How do you define success for yourself at this stage of your life?
- What are the three biggest challenges you are facing right now in your business?

Coach U Essential Coaching Tools pg. 30

Resources

- Where to find a coach:
 - FOX referrals
 - International Coaching Federation - <https://coachfederation.org>
 - Referrals from friends
 - Contact Greg if you need direction on finding a coach
- *What Can Coaches Do For You?* By Diane Coutu & Carol Kauffman Harvard Business Review Research Report
- *Becoming a Leader-Coach: A Step-by-Step Guide to Developing People* by Center for Creative Leadership <http://solutions.ccl.org/Becoming-a-Leader-Coach>
- *Who Do You Think You Are?* By Greg McCann
- *Why Should Anyone Be Led by You?* By Goffee and Jones, Harvard Business Review
- *Feedback that Works* By Sloan Weitzel, The Center for Creative Leadership

Thank You

- Concluding thoughts
- Comments, questions



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Leadership Storytelling:

Bringing it All Together

Talli Sperry, Head of Family Office Segment, The Vanguard Group

Heather Winslow-Walker, Family Legacy Specialist, The Vanguard Group

October 22, 2018 | FOX Rising Gen Forum



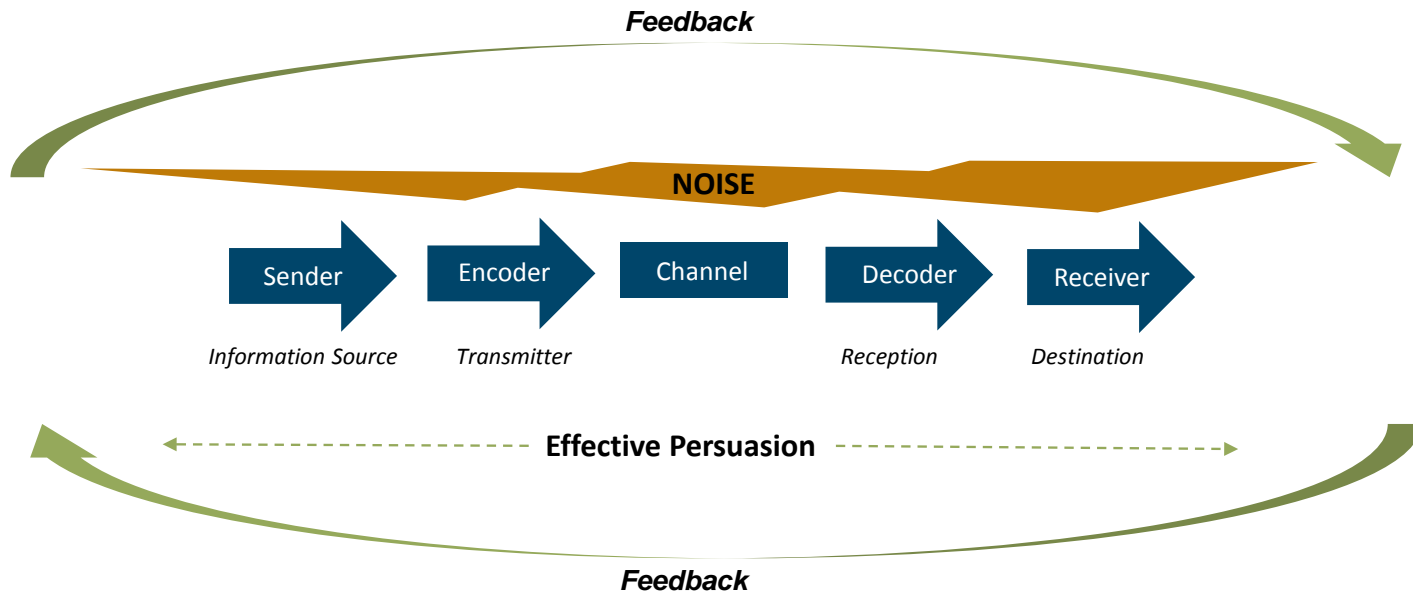
Session Objectives

- Explain the importance of collaborative persuasion.
- Identify styles of storytelling.
- Understand how to integrate your passions.
- Explore opportunities for application.

Session Roadmap



Communication Dynamics



Source: Claude Shannon and Warren Weaver, 1998. The Mathematical Theory of Communication. Board of Trustees of the University of Illinois.

Insightful Approaches

Begin united

When individuals and groups begin from a place of agreement, genuine trust and effective decision-making are more likely to occur.



Archetypal storytelling

Due to decreased attention spans and multiple distractions, people are attentive only to stories that are compelling.







Personal brand

Because trends in behavior and mindset are perceived by others as a person's brand, it is essential that individuals are intentional about being consistent.



Begin United

- Remember where we align: 
 - Connect your idea: 
 - Provide context on the value: 
 - Offer an objective approach: 
- Because we said _____
 - We should consider _____
 - That will give us _____
 - We can measure it by _____

Archetypal Storytelling

The Quest

Stranger in a Strange Land

Revenge

Rags to Riches

Love Story

Example:

Star Wars

Planet of the Apes

24

Annie

Pitch Perfect

Goal:

- Hero is tested on a journey.
- The harder the journey the more we like it.
- Teaches humanity about perseverance.

- Hero is on a journey, but not focused on a goal.
- Purpose is to achieve mastery in a new world.
- About change and the courage to cope.

- Hero begins in a world of chaos, but then sets the world right and restores order.
- Demonstrates the contrast and impact of justice compared to disorder.

- Hero is working hard in order to achieve a goal.
- Hero does not have to show character. It's merely about them hanging in there, and thus getting the goal.

- One person does something stupid, and spends the movie trying to win back the one they value.
- In the end love = being known and accepting each other's flaws.

Personal Brand

Self Awareness

The ability to:

- Recognize your own emotions and understand how they affect your thoughts and behavior.
- Know your strengths and weaknesses.
- Self-confidence.
- Observe how you feel and react in situations.



Self Management

The ability to:

- Control impulsive feelings and behaviors.
- Manage emotions in healthy ways.
- Take initiative.
- Follow through on commitments.
- Adapt to changing circumstances.



Social Awareness

The ability to:

- Observe and understand the needs and concerns of others.
- Comprehend non-verbal and emotional cues.
- Recognize power dynamics in a group.
- Feel and display empathy.



Relationship Management

The ability to:

- Develop and maintain good relationships.
- Communicate clearly.
- Inspire and influence others.
- Work well in a team.



Your Brand

Application to Family Legacy

Lessons learned



Personal values



Family vision



How to Get Traction

Influencing others



Test driving ideas



Dealing with dynamics



Summary

- Plan ahead to ensure techniques that facilitate effective communication are utilized.
- Reflect on your place in the family legacy.
- Influence others to test drive an idea.



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