

Thursday, April 19, 2018

All Forum sessions will take place in Sullivan AB on the first floor of the Loews Chicago Hotel

12:00 pm **Registration** **Sullivan Foyer**

12:00 pm **Luncheon** **Sullivan C**

1:00 pm **[FOX Overview of Forum](#)**

Alexandre Monnier, President, Family Office Exchange

1:10 pm
to
5:00 pm

Family Enterprise Strategy and Leadership Development

- **[Family Enterprise Strategy and Leadership](#)**

Sara Hamilton, CEO and Founder, Family Office Exchange

Charles B. Grace, III, Managing Director, Advisory Services, Family Office Exchange

Miguel López de Silanes, Managing Director, Europe and Latin America, Family Office Exchange

A panel of FOX Enterprise Leaders will share best practices that global families use to strengthen their family enterprises. When the family values the continuation of the family and their enterprise beyond the original operating business, a set of guiding principles and practices lead the way for generations to come. Topics in this session will include how assets are owned in a family enterprise, how businesses grow, how decisions are made, what family learning and leadership looks like, how boards are selected and evaluated, and what place entrepreneurship holds for the family. Attendees will have the opportunity to ask questions of the panel participants.

- **[Case Study: Knell Family Enterprise Strategy and Leadership Development](#)**

Moderator: Charles B. Grace, III, Managing Director, Advisory Services, Family Office Exchange

Panelists:

Harvey G. Knell, Founder and President, KCB Management

Lorin Knell, Managing Director, KCB Management

Peter Knell, Managing Director, KCB Management

Upon the sale of the Knell family's operating business, Harvey was confronted with a new set of challenges. How could he work to "let go early" like his father did so effectively, how he would support the transition of his family wealth, and most importantly to Harvey, how would he ensure critical skills were developed within his family to manage the enterprise. Allowing for the independence his sons desired and establishing accountability were top of mind as his family worked together to establish a successful family enterprise. Developing their own best practices framework, Harvey Knell and his sons, Lorin and Peter, will share how the family devised their strategy and developed family members as future leaders of their family enterprise.

- **[Owner Dialogues: Enterprise Strategy and Leadership Development Discussion](#)**

In roundtable format, share your challenges and your successes as you work towards strengthening various components of your family enterprise, as gathering wisdom from peers is insightful and illuminating.

6:30 pm **Forum Reception and Dinner** **Pullman**

Friday, April 20, 2018

8:00 am Breakfast..... Sullivan C

9:00 am
to
12:30 pm**Families of Impact**

- **Impact Families: Making a Difference in Business, Philanthropy, and Society**

Bruce Boyd, Principal, Arabella Advisors

Paulina Cromwell, Product Manager, Knowledge Center, Family Office Exchange

In this session we will explore how families make a difference on issues that are important to them through their businesses, their investing and their giving. Increasingly, we observe how families, wishing to make an impact with their wealth in their lifetime, have found creative ways to integrate both business concerns with philanthropic goals. Bruce and Paulina will share introductory comments on best practices in philanthropy, impact investing and environmental/social/governance concerns.

- **Experience Panel**

Moderator: Bruce Boyd, Principal, Arabella Advisors

Panelists:

F.K. Day, Co-Founder and Executive Vice President, SRAM Corporation / Co-Founder and Chairman of the Board, World Bicycle Relief

Rob Heinrich, Board Member, Morrison Family Foundation

Robin Steans, Board Chair, Steans Family Foundation

Many families have adopted strategic approaches to the way they run their businesses and their life in an integrated fashion. Some have applied business expertise to their philanthropic causes, and others have pursued impact across all of their investments to promote social and environmental returns. Representatives from three families will share their knowledge and experiences.

- **Collaborative Learning Circles**

Participants will have the opportunity to rotate through 2 topics of their choice.

12:30 pm Luncheon..... Sullivan C

• Agenda continues on next page •

Friday, April 20, 2018

1:30 pm
to
5:00 pm**Commitment to Family Learning**

- **Breakthroughs in Family Learning:
Opening Insights on Goals for the FOX Family Learning Network**

Amy Hart Clyne, Executive Director, Family Office Exchange

While we are accustomed to quarterly family meetings, monthly portfolio reviews, and annual family philanthropy gatherings, the environment in which families are learning is changing rapidly. At the same time, families are increasingly in search of more engaging learning opportunities for families. Families are seeking to inspire future wealth owners so the rising generation gets a chance to learn from the family and from the peer communities they join.

- **How to Make Learning More Engaging: Case Studies and Hands-on Exercises**

Sharna Goldseker, Executive Director, 21/64

Sharna will share family learning case stories and interactive approaches in family learning that helped build the muscles for exploration, enhanced capacity for critical thinking, and ultimately gave family members the opportunity to develop self-concept to navigate through the world of opportunities available to them. Sharna will describe hands-on tools utilized to engage multi-generation families and how they helped families achieve their goals. You will have the opportunity to utilize the same tools in order to apply them back at home after experiencing them here in this session.

- **Roundtable Discussion with Family Learning Network Educators**

Moderator: Jane Flanagan, Managing Director, Family Office Exchange

Family Educators:

Mindy Kalinowsky Earley, CMP, CFBA, Lifelong Learning Specialist, RDV Corporation

Alexandria Elliott, Learning Officer, Chifam LLC

Ernie Patterson, Vice President, Director, Family Shareholder Relations, Brown-Forman

Leading family learning educators will each share 2-3 techniques that have been successful in supporting the unique learning objectives of some of their families. Explore which ones might resonate for you whether you are new at developing an educational curriculum or an experienced family that wants to go deeper. Time will be available for interactive dialogue.

5:00 pm **Forum Adjourns**