2018 FOX Wealth Advisor Forum™
AGENDA

Tuesday, May 15, 2018

6:00 pm - 8:00pm Welcome Reception .... **Field Room, 14th Floor**

Wednesday, May 16, 2018

7:30 am Registration .... **Adler Foyer, 15th Floor**

7:30 am Breakfast .... **Rookery Ballroom, 14th Floor**

8:30 am Welcome – On the Minds of Members .... **Adler Ballroom, 15th Floor**

Alexandre Monnier, President, Family Office Exchange

Much of the work we do at Family Office Exchange focuses on identifying the trends and issues having an immediate or imminent impact on families of wealth. In this session, we'll explore what's on the minds of members, including issues related to tax reform and how families are responding to the recent changes, the evolving role of a fiduciary, longevity and our responsibilities as advisors, the importance of trust in financial services, and how advisors are successfully responding to a shifting talent and culture paradigm.

9:20 am The Intersection of Trust, Financial Services and the Family Business .... **Adler Ballroom, 15th Floor**

Jamie Kieffer, Managing Director, Client Strategy, Edelman

Katie Spring, General Manager, Financial Communications, Edelman

According to the 2018 Edelman Trust Barometer, people's trust in business, government, NGOs and media has yet to recover, revealing growing levels of mistrust globally. However, positive regulatory steps, a renewed focus on client satisfaction and data security, and a clearly communicated social purpose have helped the financial services industry reestablish some of the trust lost during the financial crisis. Yet, only about half of the public view the industry favorably. Contrast this with family businesses, the most trusted form of business globally, and it's apparent there's still much work to be done. In this session, we'll discuss the role of trust in financial services, the connection between wealth and skepticism, and best practices the financial services industry can adopt to continue to build trust.

10:10 am Morning Networking Break .... **Adler Ballroom, 15th Floor**

10:40 am Longevity, Aging & Incapacity: Cutting-Edge Approaches to Managing Modern Risks .... **Adler Ballroom, 15th Floor**

James Grubman, Ph.D., Family Wealth Consulting

Be careful what you wish for—increasing longevity is bringing a host of unanticipated risks. Affluent families may now have active members spanning seventy years (ages 20 to 90), upending traditional succession and spending plans. Of greater concern is the risk of senior clients developing dementia, imperiling the wealth management relationship. Dr. James Grubman, a family wealth consultant with neuropsychological and estate planning expertise, will lead an in-depth interactive session on identifying longevity risks, symptoms, and solutions for wealth advisory practices.

12:10 pm Luncheon .... **Rookery Ballroom, 14th Floor**

1:15 pm Enhance Your Effectiveness by Refreshing Your Listening Techniques .... **Adler Ballroom, 15th Floor**

Laura Daley, Senior Consultant, Paravis Partners

In this interactive session, we'll examine how adopting a listening framework and developing the skills to listen strategically can help elevate your effectiveness as an advisor. We'll then connect the dots with real life examples of how executives have successfully applied a listening framework to communicate and resonate with clients and colleagues authentically, resulting in an immediate positive impact on their relationships. Armed with these new skills, you'll also have a chance to practice with your peers in an interactive dialogue session.

Wednesday, May 16, 2018 *continued…*

2:45 pm **Peer Dialogues** .... **Adler Ballroom, 15th Floor**

Join your peers in high-level, face-to-face roundtable discussions about topics of most concern to wealth advisors. Each session will be facilitated by a member of the FOX team dedicated to generating strategic conversation focused on sharing ideas and solutions for business decisions ahead.

3:45 pm **Afternoon Networking Break** .... **Adler Foyer, 15th Floor**

4:00 pm **Cybersecurity for Ultra-High Net Worth Investors: Understanding and Minimizing the Threat Environment** .... **Adler Ballroom, 15th Floor**

Jim Trainor, Senior Vice President, Aon Cyber Solutions

New research confirms that ultra-high net worth investors are concerned more about cybersecurity than they are about market volatility, changing interest rates, or asset allocation. Jim Trainor, Senior Vice President with Aon Cyber Solutions and former Assistant Director of the FBI's Cyber Division, will share his perspective on the evolving cybersecurity threat landscape and offer practical advice on how high net worth investors, family offices, and the institutions that serve them can reduce risk and gain the upper hand on hackers and other adversaries.

5:00 pm **Adjournment**

6:00 pm **Forum Dinner Reception** .... **Boleo Restaurant, 15th Floor**

This year's Wealth Advisor Forum Dinner Reception will take place at Boleo, a rooftop restaurant and lounge perched high above the city under a retractable glass roof on the 15th floor of the Kimpton Gray Hotel. Join us for an evening of networking and camaraderie with your peers!

Thursday, May 17, 2018

8:00 am **Registration** .... **Adler Foyer, 15th Floor**

8:00 am **Breakfast** .... **Rookery Ballroom, 14th Floor**

9:00 am **A Firm's Cultural Necessities in the New Talent Landscape** .... **Adler Ballroom, 15th Floor**

Susan R. Colpitts, Founder, Chief of Client Experience, Signature Family Wealth Advisors

Mark Galante, President | Northeast Zone & Strategic Alliances, PURE Insurance

David F. Toth, Managing Director, Family Office Exchange

According to research by FOX's David Toth, advisors are facing the dilemma of replacing retiring baby boomers - along with their institutional knowledge - in large numbers, while adapting their "employment brand" to be attractive to a different generation of workers. As employees seek companies with cultures that align with their own values, recruiting and retaining the best and the brightest requires a strategic approach to talent. In this discussion, David will be joined by Susan Colpitts, Founder, Chief of Client Experience, Signature Family Wealth Advisors, and Mark Galante, President | Northeast Zone & Strategic Alliances, PURE Insurance who will cover their strategies in addressing the new talent landscape.

9:50 am **Reverse Mentoring and the Employer-Employee Relationship of the Future** .. **Adler Ballroom, 15th Floor**

Kayla Kennelly, Vice President, Business Development, BNY Mellon | Pershing

David Lake, Vice President, BNY Mellon | Pershing

By 2030, nearly 75% of employees are projected to be Millennials. For some time now, forward-thinking organizations have been laying the groundwork for this generation and the changes in expectations, work styles, and values that they are ushering in. In recognition of these changes, two Millennials and a senior sponsor at Pershing launched a reverse mentoring program, "Connect," focused on leveraging young talent to build the firm of the future. Kayla Kennelly and David Lake will talk about their experiences and what makes a successful reverse mentoring relationship. In addition, you'll learn more about best practices that could be implemented at your firm.

10:40 am **Morning Networking Break** .... **Adler Foyer, 15th Floor**

11:10 am **Artificial Intelligence and Digital Disruption in Wealth Management: Capturing the Client of the Future** .... **Adler Ballroom, 15th Floor**

Robert Stanich, Global Banking and Financial Markets, IBM Watson Financial Services

Wealth Managers are facing disruptive innovation from new and emerging technologies such as artificial intelligence, machine learning, blockchain, chatbots, and more. The future of these firms will be led by "bionic" relationship, sales, and service managers who leverage cognitive and analytics solutions to better serve their client's needs and serve them at scale. Given this sweeping and disruptive wave of change, how will this industry need to evolve, and what will it look like in the future?

12:00 pm **Event Concludes**

Grab and Go Lunch will be provided.

Special thanks to the FOX Wealth Advisor Forum Advisory Board:

***Stephanie Diamond**, Managing Director – Relationship Management, Schwab Charitable*

***Brandon Hamm**, Attorney, Koley Jessen P.C., L.L.O.*

***Anna Nichols**, Director of Communications, Altair Advisors LLC*

***Kathryn Norris**, VP, Family Office Practice Leader, Chubb Personal Risk Services*