

Sunday, May 5, 2019

Forum Materials may be found online at: [www.familyoffice.com/RG19](http://www.familyoffice.com/RG19)

Wireless Internet Access: Network: Family19      Password: Exchange19

- 9:00 am - 11:00 am    **FOX Rising Gen Gives Back (optional)** .....Fortnight Ballroom
- 11:30 am    **Registration Opens**.....Mosaic Foyer
- 11:45 am    **Networking Luncheon**..... Fortnight Ballroom
- 12:30 pm    **Welcome**.....Mosaic Ballroom  
*Paulina Cromwell, CFA, Product Manager, Family Office Exchange*
- 12:45 pm    **Discovery Session I**.....Mosaic Ballroom  
*Kathy Bayert, Director, Program Design, Family Office Exchange*  
  
A highly valued benefit of participating in a FOX Rising Gen Forum is getting to know your peers in a safe space to explore the challenges and opportunities facing young people of wealth. We will “break the ice” and kick-off the Spring Forum with fun, interactive games designed to jump-start your networking.
- 1:15 pm    **Family Dynamics: Effective Family Conversations**.....Mosaic Ballroom  
*Ann Dugan, Senior Managing Director, Family Office Exchange*  
  
Navigating family dynamics can be challenging in any family, however, add the complexity of significant wealth or business ownership and those challenges can amplify. As a Rising Gen, knowing how to initiate and manage difficult conversations around substantive family issues such as conflict, succession, and engaging the next generation can be a powerful tool. Join two experienced family members who have journeyed these roads themselves and on the behalf of clients to gain practical tools for having effective conversations within your own family.
- 2:45 pm    **Networking Break**.....Mosaic Foyer
- 3:15 pm    **Creating a Personal Learning Plan**.....Mosaic Ballroom  
*Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer, FOX Family Learning Center™*  
  
Whether your goal is financial literacy, personal growth, or preparing for transition into leadership, having a clear plan to gain the skills, knowledge, and experience you need is essential. Understand components of an effective plan to help align your learning with your values, goals, and ambitions.
- 4:15 pm    **Member Spotlight**.....Mosaic Ballroom  
*Callie Elmore, Elmore Companies*
- 4:20 pm    **Rising Gen Peer Dialogue**.....Mosaic Ballroom  
*Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer, FOX Family Learning Center™*  
Choose a topic and join in facilitated discussions with peers.
- 5:30 pm    **Closing Remarks & Adjourn**.....Mosaic Ballroom  
*Nate Hamilton, CFA, FOX Advisory Board Member, Family Office Exchange*
- 6:30 pm    **Cocktail Reception & Dinner**.....Terrace Room, 5<sup>th</sup> Floor

• Agenda continues on next page •

**Monday, May 6, 2019**

**8:00 am Registration.....Mosaic Foyer**

**Breakfast.....Fortnight Ballroom**

**9:00 am Opening Remarks.....Mosaic Ballroom**

*Paulina Cromwell, CFA, Product Manager, Family Office Exchange*

**9:05 am DISCOVERY SESSION II –  
What Do You Want the Leadership Generation to Know?.....Mosaic Ballroom**

*Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer, FOX Family Learning Center™  
Mercy Goddard, Vice President and Family Member, Investment Resources Corporation*

Using a brainwriting exercise, we will define the issues and ideas that you want the Leadership Generation to know about your interests, capabilities, and goals.

**9:45 am Three Degrees of Engagement in Personal Investing**

Whether you are an experienced investor or just learning to understand a financial statement, these sessions will provide you with information to better grasp your own and your family's financial picture and give you hands-on strategies to apply your learnings.

**Beginner.....Pegasus Salon**

*Jeffrey Dunn, CFP, Director, Client Advisory Team, Tolleson Wealth Management*

- An introductory session will focus on financial literacy, including: budgeting, banking and credit, taxes, and financial institutions.

**Intermediate.....Fortnight Ballroom**

*Paulina Cromwell, CFA, Product Manager, Family Office Exchange*

- An intermediate session will focus on investment strategy, including: establishing objectives, return and risk measures, defining asset classes, and setting asset allocation.

**Advanced.....Mosaic Ballroom**

*Kristi Kuechler, Managing Director, Investor Market, Family Office Exchange*

- An advanced session will go deeper into investment portfolio mechanics, with topics including: investment vehicles and management styles, factor construction, and liquidity management.

**11:45 am Networking Luncheon and Peer Dialogue: Life Stages.....Fortnight Ballroom**

*Mercy Goddard, Vice President and Family Member, Investment Resources Corporation*

While we are all part of the Rising Generation, many of us are at different stages in life, encountering challenges and opportunities unique to that life stage. This Luncheon will provide a chance to talk with peers who share a similar life stage including:

- The Single Life
- Engaging Your Spouse/Partner in the Family Enterprise
- Parents: Involving the Kids
- Stepping into the Leadership Generation

[• Agenda continues on next page •](#)

**Monday, May 6, 2019** *continued*

**12:45 pm**    **Developing Your Personal Brand.....Mosaic Ballroom**

*Dave Loomis, Founder and President, Loomis Marketing, LLC*

Branding isn't limited to marketing a product, service, or business. Articulating a personal brand – a statement about who you are and what you have to offer – is a powerful way to direct your career development and control how you are perceived within your family. This interactive session will guide you through the process of creating your personal brand and explore how you can bring it to life.

**1:45 pm**    **Closing Remarks and Staying Connected.....Mosaic Ballroom**

*Nate Hamilton, CFA, FOX Advisory Board Member, Family Office Exchange*