

Sunday, October 27, 2019

Forum Materials may be found online at: www.familyoffice.com/RGF19

Wireless Internet Access: Network: JWMarriott_CONFERENCE Password: FOX2019

- 1:00 pm Registration Opens.....Grand Foyer**
- 2:00 pm Opening Remarks.....Grand A**
Heather Abramson, Regional Director, Membership, West
Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer
- 2:15 pm Discovery Session..... Grand A**
Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer
 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 with fun, interactive games designed to jump-start your networking.
- 3:00 pm Crafting Impact.....Grand A**
Justin Rockefeller, Global Director of Family Offices and Foundations, Addepar
 Hear how a 5th generation family member from a storied family has learned to blend family legacy and family values to shape a new approach to managing capital and philanthropy, striving for a greater impact in the world. Justin Rockefeller will share how he brings his expertise in technology, impact investing, and philanthropy to inform not only his role with Addepar, a technology firm, but also to the work of The ImPact, a social enterprise that aims to affect significant social change, as well as through the work of his family’s foundation.
- 4:30 pm Rising Gen Peer DialogueGrand A**
 Participants will choose a topic and join in facilitated discussions with peers. Topics may include life stages (e.g. The Single Life, Engaging the Spouse), working in the family enterprise, family dynamics and communications, preparing for succession, and governance roles.
- 5:30 pm Closing Remarks & Adjourn..... Grand A**
- 6:30 pm Cocktail Reception & Dinner.....LUXBAR**
 Join us at LUXBAR, in Chicago’s historic Gold Coast district, for a casual dinner with your fellow FOX Rising Gen attendees. 18 E. Bellevue Pl
Bar & Fireplace Room
(2nd Fl)
Chicago, IL 60611
**Shuttle service will be provided beginning at 6:00pm at the LaSalle Street Entrance of the JW Marriott hotel.*

Monday, October 28, 2019

- 8:00 am Registration.....Grand Foyer**
Breakfast.....Madison (3rd FL)
- 9:00 am Opening Remarks.....Grand A**
Heather Abramson, Regional Director, Membership, West
Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer
- 9:10 am Generation Succession..... Grand A**
Nate Imfeld, Attorney, Foley & Lardner, LLP
Torri Hawley, Windway Capital, NextGen

Explore the good, the bad, and the ugly around succession and generational transitions of power and control within families of wealth. Hear from one Gen 6 family on their recent generational succession, what prompted the transition, and how they navigated the practical and emotional challenges.
- 10:00 am Ask the Expert: Roundtable Discussions with FOX Subject Matter Experts.....Grand A**
Bring your issues, concerns, and burning questions to a roundtable discussion with FOX subject matter experts on topics such as family dynamics and communications, building investment strategies and direct investing, unique challenges and opportunities facing international families, and governance roles and opportunities for rising generation family members.
- 11:00 am Networking Break..... Grand Foyer**
- 11:15 am The Engaged Beneficiary: What You Need to KnowGrand A**
Robert (Bob) Hammett, Vice President, Chifam LLC
Stephanie Hammett, Chifam LLC, NextGen
Sarah Kerr Severson, Partner, Schiff Hardin, LLP

What does it mean to be an engaged and responsible beneficiary? We will explore the roles and responsibilities of a trustee and learn from a father-daughter team about how they make the trustee-beneficiary relationship work. We will understand the roles each party plays and how to effectively approach trust-related communications.
- 12:15 pm Closing Remarks & Adjourn..... Grand A**