

Family Office Exchange Code of Conduct

Family Office Exchange (FOX) is committed to creating a safe learning environment where members can share knowledge and exchange best practices among peers. As part of FOX's code of conduct, attendees are expected to adhere to a strict no solicitation policy during and after the Forum.

Networking and relationship building with all members is strongly encouraged. However, service providers should only offer business cards in response to a direct "ask." It should be noted that these rules of engagement also apply to families that may provide investment advice or other services to outside families.

All discussions are expected to be kept in strict confidence.