

Celebrating and Connecting Families of Impact

OCTOBER 29-30 | JW MARRIOTT | CHICAGO, IL



TABLE OF CONTENTS

TUESDAY, OCT. 29

WEDNESDAY, OCT. 30

FOX 100

EXHIBITORS

2020 FORUM DATES

This year's Forum marked a significant milestone as we celebrated a generation of working closely with families, family office executives, and trusted advisors. Participants from 18 countries learned from successful families of impact as they shared their challenges and successes in bridging multiple generations. Our featured families shared stories about building resilience across generations, planning for leadership succession, and engaging family members in the process.

Participants engaged in a wide selection of interactive sessions and had the opportunity to visit with old friends and network with new ones in our unique peer community.

"High caliber content and attendees – excellent environment for learning and sharing ideas." – 2019 Attendee

TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------



HOW TO NAVIGATE THIS DOCUMENT

Click the session titles below or tabs above to quickly navigate between sessions.



Looking Forward to New Challenges

Sara Hamilton, Founder and Chief Executive Officer, Family Office Exchange
 Pg. 3

Generation 1-2 Builders: Designing a Shared Vision for the Hojel Family

Phyllis C. Hojel, Gen 1 Founder, HM International, LLC, Mexico
Richard C. Hojel, Gen 2 Family Leader, HM International, LLC, Mexico
Moderator: Margaret Vaughan Cox, President, MCV Consulting
 Pg. 5

Generation 2-3 Leadership Transition: From Preparation to Empowerment with the Gallardo Family

Ana Gallardo, Co-Chair, Strategy Committee, Gallardo Family Group, Spain
Carlos Gallardo, Co-Chair, Strategy Committee, Gallardo Family Group, Spain
Moderator: Sara Hamilton, Founder and Chief Executive Officer, Family Office Exchange
 Pg. 7

Generation 4-7 Family Engagement: Constant Nurturing and Evolution of the Todd Family Enterprise

Andrew Hull, Chief Executive Officer, Todd Family Office, New Zealand
Charles Reid, Family Director, Todd Family Office; Chair, Todd Family Council, New Zealand
Moderator: Charles B. Grace, III, Managing Director, Advisory and Education Services, Family Office Exchange
 Pg. 9

Member Dinner at Theater on the Lake
 Pg.10

Looking Forward: The Future of Wealth Management

Bill Sullivan, President, Family Office Exchange
Wayne Osborne, Chief Executive Officer of a Gen 1 Family Office in the San Francisco Bay Area
Maurizio Petta, Chief Executive Officer, Seragnoli Family Office
 Pg. 11

The Future of the Family Office

Michael Montgomery, Chief Executive Officer, Ford Estates, LLC and Brush Street Investments, LLC
Richard L. Roeding, Jr., President, Summer Hill, Inc.
Moderator: Glen W. Johnson, Chief Operating Officer, Family Office Exchange
 Pg.12

Rising Gen Perspectives: What We Want Our Parents to Know

Nate Hamilton, Advisory Board Member, Family Office Exchange
Stephanie Hammett, NextGen, ChiFam, LLC
Jessica Swoyer Green, Family Council Chair, The Duchossois Family
Shivani Trivedi, Vice President, Trivedi Family Office & Foundation
Moderator: Mindy Kalinowski Earley, CMP, CFBA, Chief Learning Officer, Family Office Exchange
 Pg. 13

FOX Forum Moments Pg. 14

The Top FOX 100 Pg. 15

Thank You to Our Exhibitors Pg. 16

2020 FOX Forum Dates Pg. 17

TABLE OF CONTENTS

TUESDAY, OCT. 29

WEDNESDAY, OCT. 30

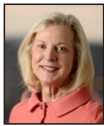
FOX 100

EXHIBITORS

2020 FORUM DATES

Looking Forward to New Challenges

PRESENTER



Sara Hamilton
Founder and Chief
Executive Officer,
Family Office Exchange

SESSION DESCRIPTION

Sara Hamilton kicked off the 30th Anniversary Forum by reflecting on the profiles and priorities of wealth owners over the last three decades, emphasizing how they evolved in each period. Focusing on the decade ahead, she explored how different it will be from any other. Continued innovation and technological disruption will expose all to dramatic change at a disorienting pace.

KEY INSIGHTS

Sara identified seven key areas of change and transformative impact for the next decade:

- **Changes in the family** are evident already. More blended families with complex dynamics. More social responsibility mandates. More owner involvement. More complexity to manage. Combined, these evolving characteristics will create a radically different family landscape.
- Wider geographic footprints will make **family engagement** more challenging. For younger generations conditioned to seeing a “big picture” view, more thoughtful education around complex and diverse choices will be needed. Increased transparency will be critical to build trust across generations and engender family commitment.
- Cousins will have to work across distances to craft a shared **family vision and strategy**. Putting private capital to work will drive the enterprise strategy. The pace of change will add an urgency to decision-making. And having a governance structure that encompasses all of this will grow in importance.
- The shift from single-business families to **enterprise-centric families** will continue, with more confidence placed in private investments than the stock market. Multiple direct investments will provide industry diversification. Co-investment partnering will be more common. Delivering holistic enterprise education will improve the chances the family wants to stay together.
- **Risk assessment and management** will no longer be based on historic data. Instead, it will have to account for the unknown and unforeseen, requiring a level of comfort with ambiguity in higher-risk alternatives. Formal processes to evaluate opportunities and risks will be table stakes.
- Achieving **philanthropic impact** in family members’ own lifetimes will be the order of the day, instead of perpetual family foundations. A redefined sense of social responsibility will lead to global mandates. Local impact in the founders’ hometown will become only a portion of the equation.



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– 2019 Attendee*

TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

Looking Forward to New Challenges (continued)



- Engaged owners will value tech-savvy, strategic **advisor relationships** to help with scenario planning. The advisors who come out on top will be those leveraging leading-edge technology (such as predictive analytics) in managing opportunities and risks, helping more-involved owners better evaluate alternatives.

The next decade presents many opportunities; successful owners will be those who capitalize on them. Sara shared the ways FOX will continue to add value by helping members see what’s ahead; sharing knowledge, lessons learned, and best practices; and helping members identify closest peers and strategic industry partners.



Sara also introduced FOX’s new leadership team - Bill Sullivan, President, and Glen W. Johnson, Chief Operating Officer. During this decade of disruption, members will benefit from their:

- Deep industry experience and ability to identify areas of change;
- Understanding of disruption’s implications and effects on families;
- Ability to translate stages of change into manageable strategies; and
- Commitment to help find solutions for problems never seen before.



“FOX will continue to add value by helping members see what’s ahead; sharing knowledge, lessons learned, and best practices; and helping members identify closest peers and strategic industry partners.”
 – Sara Hamilton



TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

Generation 1-2 Builders: Designing a Shared Vision for the Hojel Family

PANELISTS



Phyllis C. Hojel
Gen 1 Founder,
HM International, LLC,
Mexico



Richard C. Hojel
Gen 2 Family Leader,
HM International, LLC,
Mexico

MODERATOR



Margaret Vaughan Cox
President,
MCV Consulting

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“What drives us is the operations and growing the business organically.”
– Richard C. Hojel

SESSION DESCRIPTION

Richard Hojel was a unique Mexican business owner who preferred partnership over personal control. He launched several companies in his lifetime, maneuvering past physical handicaps thanks to the tremendous support from his wife, Phyllis Hojel, and their four children. At the time of his death, he had an extensive network of business owner peers, oversight of a number of operating companies, and a diverse property portfolio. Prior to Richard’s death, his oldest son, Richard C. Hojel, stepped in to learn the operating companies. Along with his siblings and their spouses, Richard C. created a shared governance process that Gen 3s are now eager to understand.

KEY INSIGHTS

- Early difficulties – an accident, long recovery and resulting disabilities for the patriarch, as well as a failed partnership – taught the Hojel family perseverance and the importance of trying again. The patriarch, Richard, was an entrepreneur at heart and found a way to start over again with new partners that enabled the family businesses to thrive.
- Following the patriarch’s unexpected death, staying together became a rallying point for the family. And there was no question Richard C. Hojel, would step in to lead the family business, working closely with his mother and siblings. As a young leader at the time, he relied on the wisdom of his father’s business partners, who provided crucial mentoring and guidance as he shepherded the family businesses.
- As Gen 2 grew to include spouses, the family thought it would be more additive than not to include them in the governance process – and they were right. Two of the brothers-in-law had found success in their own right (one a successful business owner, one a lawyer) and became important in analyzing enterprise strategy.



TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

Generation 1-2 Builders: Designing a Shared Vision for the Hojel Family (continued)

“We had a need to show we could earn the legacy we’d been given, and we chose to reinvest in the businesses, driven by a need to “prove” ourselves.”
– Richard C. Hojel

- The family is very conscious to avoid a sense of entitlement with the rising generation and have been very careful in sharing information. They want to encourage the individual spark or drive the younger generation might possess to carve out their own future. They are working to develop the entrepreneurial spirit among Gen 3 by sharing the family’s success stories and failures.
- The family has engaged in a series of steps to prepare Gen 3s for the next decade. After creating an in-depth history map, the Gen 2s shared the family’s history, governance, and their own case study, while also describing their business decision-making process. Next, the Gen 2s will provide a more detailed overview of the companies owned by the enterprise with the eldest members of the next generation.



TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

Generation 2-3 Leadership Transition: From Preparation to Empowerment with the Gallardo Family

PANELISTS

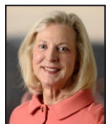


Ana Gallardo
Co-Chair, Strategy Committee, Gallardo Family Group, Spain



Carlos Gallardo
Co-Chair, Strategy Committee, Gallardo Family Group, Spain

MODERATOR



Sara Hamilton
Founder and Chief Executive Officer, Family Office Exchange

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“In 2013, I had the opportunity to start up my own venture. I have never regretted that decision. This was the trigger for the succession plan.”
– Carlos Gallardo

SESSION DESCRIPTION

Two leaders in a Gen 3 cousin’s group from Barcelona shared their transition story to becoming an Enterprise Family – or as they put it, changing from “many years in training to finally moving to the playing field.” They outlined the triggering events for their transition, the process they went through to define their collective Gen 3 future vision, and how they used strategy committee roles to establish credibility with Gen 2. They also described their current leadership structure and how they are preparing the Gen 4 for ownership and future leadership.

KEY INSIGHTS

- The family’s pharmaceutical enterprise began in the 1940’s with a Gen 1 patriarch who did not share information with his sons – they had almost no information and very little latitude in making decisions. The Gen 3s were educated and trained – with many working in the business – but family meetings were essentially structured to be rubber-stamp sessions for decisions made without their input.
- The turning point was when Carlos, a Gen 3 cousin, decided to leave the family business to start his own entrepreneurial venture. This served as a wake-up call for the Gen 2s, who then shifted their focus to educating the next generation. The family engaged in a visioning process and developed their family principles: togetherness, next generation roles, philanthropy, and a dividend policy.
- The transition process and a 30-year plan were decided by the entire family (and advisors) with total transparency. All contributed to defining job positions (who brings what to the table), as well as the nomination and wealth review processes.



TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

Generation 2-3 Leadership Transition: From Preparation to Empowerment with the Gallardo Family (continued)



- As part of their exploration, the family identified a desire to focus on Gen 4 engagement. Gen 3 cousin Ana Gallardo developed a learning plan and created an Entrepreneur Club for the Gen 4s, supporting entrepreneurial ideas with seed funds and annual awards.
- External advisors played a critical role in helping the Gen 2s support succession and transition, and make plans for engaging the next generations.
- Through this process, the family realized setting the transition’s pace to the most change-averse member was key. Everyone in the family must feel comfortable and that no one feels left behind.

“You have to get a clear message from the group if you want to communicate to the previous generation. Don’t hesitate to push if you want something.”
 – Carlos Gallardo

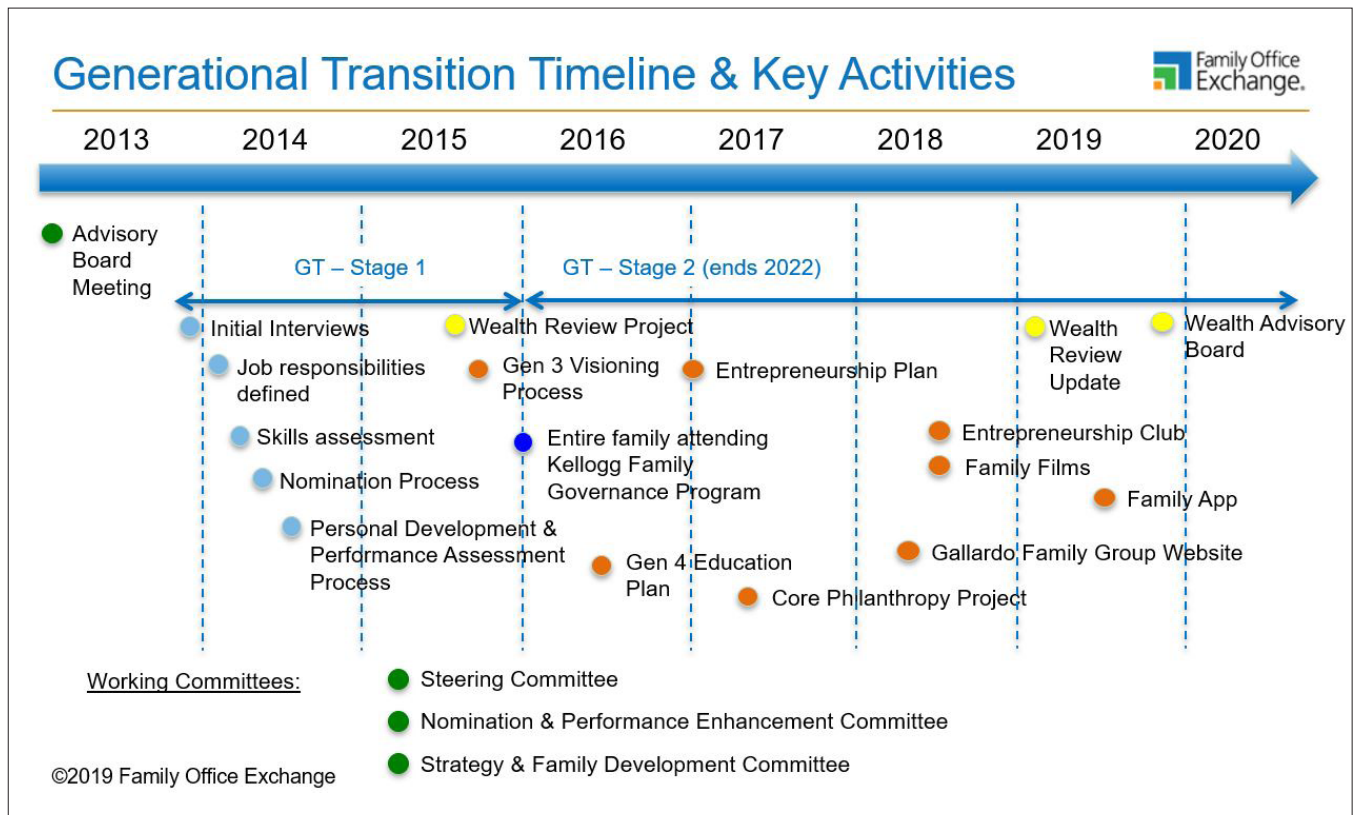


TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

Generation 4-7 Family Engagement: Constant Nurturing and Evolution of the Todd Family Enterprise

PANELISTS



Andrew Hull
Chief Executive Officer,
Todd Family Office,
New Zealand



Charles Reid
Family Director,
Todd Family Office;
Chair, Todd Family Council,
New Zealand

MODERATOR



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

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“Culture is like a fingerprint on everything you touch.”
– Andrew Hull

SESSION DESCRIPTION

Representatives from the Todd Family, a Gen 4-7 New Zealand family, shared how they keep 200+ family members (50% of whom are under age 20) connected and committed to the Family Enterprise through engagement and collaboration. The Family Office leader described how the office has adapted to drive client satisfaction, and how their strategic planning process center on creating understanding around the office’s relevance to the family.

KEY INSIGHTS

- Through constant nurturing and evolution, the Todds have fully evolved into an Enterprise Family. Their origins date to an 1870s pioneering patriarch, and since then they have cycled through entrepreneurship, joint ventures, and a business and governance evolution. Today, their primary focus is on engagement among more than 200 family members.
- Their business and governance evolution focused on the operating business, philanthropy, and wealth management, and family heritage and stewardship. Since being formed in the 1970s, the Family Office role evolved as well. Instead of its initial focus on preserving wealth, the office is now oriented on doing what’s best for the family – such as building a strategic, open and ongoing dialogue with family members.
- The family itself established a clear purpose: “we guard and grow family wealth – partnering and facilitating solutions for today and tomorrow.” Growing engagement with the Family Office has helped deepen relationships and trust.
- At the advisory level, interactions are driven by strategy, relationships, and empowering family members, and consider the size of the family in their collaborations. In all areas, shared culture is an integral component.



TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

Member Dinner at Theater on the Lake

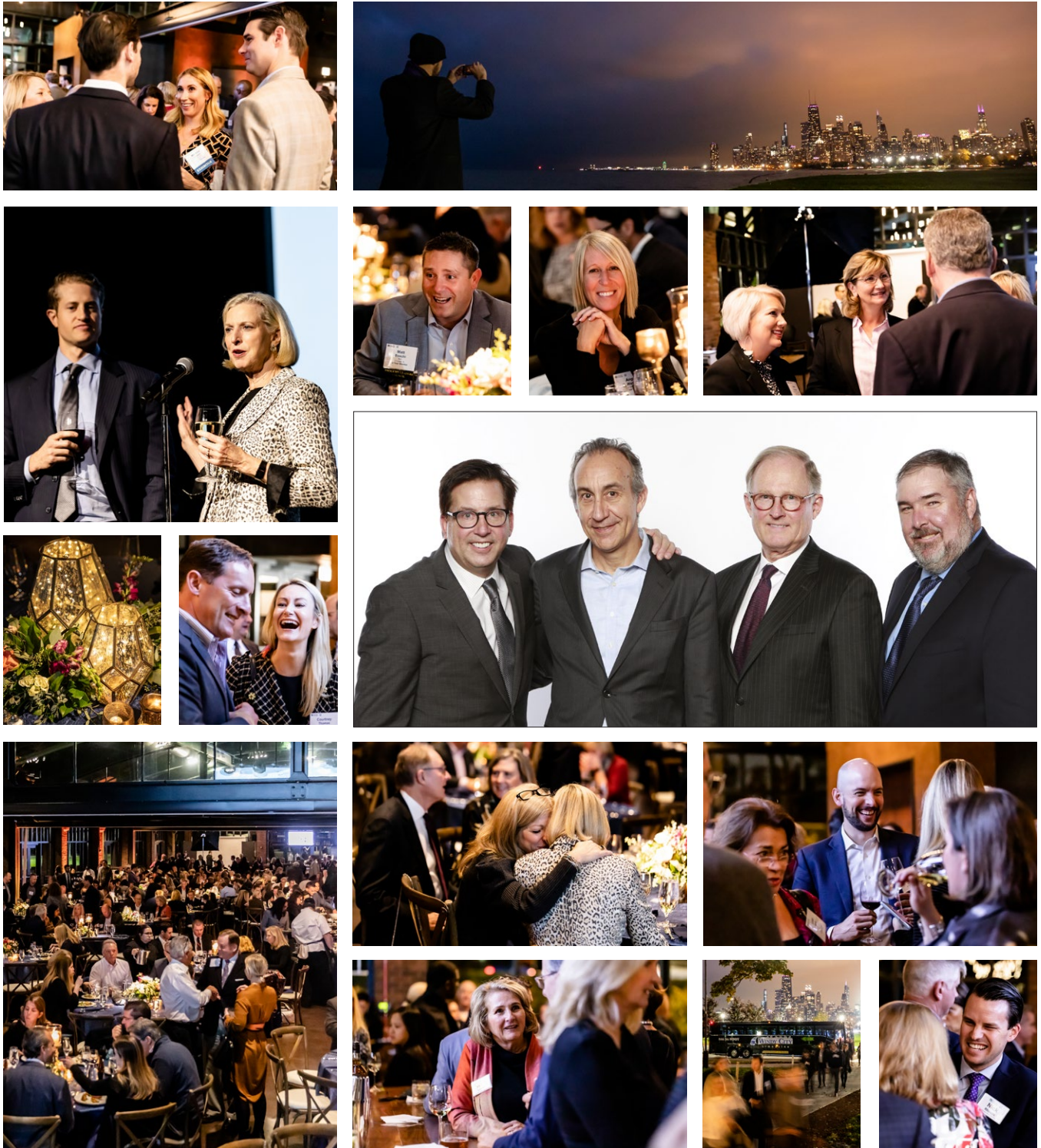


TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-----------------------------------	----------------------------------	------------------------------------	-------------------------	----------------------------	----------------------------------

Looking Forward: The Future of Wealth Management

PANELISTS



Bill Sullivan
President,
Family Office Exchange



Wayne Osborne
Chief Executive Officer
of a Gen 1 Family
Office in the San
Francisco Bay Area



Maurizio Petta
Chief Executive Officer,
Seragnoli Family Office

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SESSION DESCRIPTION

Following a discussion on how technology will reshape Family Office and wealth advisor roles, leaders on the front lines of that change shared their insights. In particular, they noted new buying behaviors among wealth owners as they come to trust, and rely on, technology. Further, they talked about how the Family Office will be positioned to play a broader role in owners lives beyond wealth management.

KEY INSIGHTS

- FOX is focusing on six major themes emerging for the future of wealth management: new opportunities for private capital; innovation disruption; transitions; family transitions; new technologies to help achieve wealth objectives; leadership among rising generations; and, family engagement and life-long learning.
- Families and their support systems face many challenges: Family Office employees stretched across a variety of roles; time pressure; outdated technology; key person risk; too many projects with tight deadlines; siloed information; anxiety and stress; and not time to share best practices.
- Technology solutions, such as Way2B1, present opportunities for Family Offices to break down silos and put control back in the wealth owner’s hands. This engenders trust between the wealth owner and the Family Office staff.
- The already complex lifestyle of ultra-wealthy families only grows more so when adding wealth management compositions such as asset management, operations, and philanthropy. All too often, families find information isn’t being shared across the Enterprise. Fortunately, technological innovation is starting to add value in the form of family well-being ecosystems that put the wealth owner at the center.
- At nearly 1/3 of the ultra-wealthy population, Millennial and Gen Z family members are aspiring to make meaningful differences in their communities and the lives of their families. They will be the primary drivers of the shift from a product/asset-centric focus to an experience focus. Gen X and Baby Boomer generations will follow their lead in adopting technology and benefiting from the results.

“Rising Gens like to see ‘the big picture’; education generates engagement, transparency leads to trust.” – Maurizio Petta

TABLE OF CONTENTS

TUESDAY, OCT. 29

WEDNESDAY, OCT. 30

FOX 100

EXHIBITORS

2020 FORUM DATES

The Future of the Family Office

PANELISTS



Michael Montgomery
Chief Executive Officer,
Ford Estates, LLC
and Brush Street
Investments, LLC



Richard L. Roeding Jr.
President,
Summer Hill, Inc.

MODERATOR



Glen W. Johnson
Chief Operating Officer,
Family Office Exchange

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"To get buy-in, you need trust. And the only way to create trust is through complete transparency."
– Richard L. Roeding, Jr.

SESSION DESCRIPTION

The Family Office of the next decade will have the opportunity to broaden their services for family clients – from financial health and property and business management to personal health, security and lifestyle management. Further, they'll need to focus on managing risk across all these dimensions. The panel cited talent transformation as a critical challenge as well – noting the vital importance of recruiting and training staff to engage with clients in new ways and roles.

KEY INSIGHTS

- Richard L. Roeding, Jr., President of Summer Hill, shared insights from his 32-year journey working with an Enterprise Family through their evolution from a Business Family to an Enterprise Family. The office currently serves Gen 1-4, includes an operating company, diversified investments, a Family Office, and family philanthropies. Through the leadership transition, the family members realized that being "builders" was what defined them and their desire to stay together as a family with the intent to build a great Enterprise.
- The family and Family Office have undergone numerous transitions over the years. They have moved from a patriarchal structure to collaborative leadership; changing the investment portfolio from single-stock concentrated to diversified direct investments; evolving estate planning from a tax focus to long-term governance; changing from grant-making to transformational gifts in their philanthropy.
- The Family Office has become an operating company managing growth, ongoing change, and management succession, while striving to maintain corporate culture. As the family has grown, the Family Office has grown its service offerings as well.
- Similarly, the Ford Estates & Brush Street Investments had a need to retool the office toward more value-added services and integrated wealth management.
- The family's growing complexity spurred a strategic assessment of the landscape facing the office. The resulting action plan had seven strategic focal points: client experience; culture and talent; Family Office model; strategic partners; operations and infrastructure; scalable strategies; and Family Office governance. The plan created 32 distinct workstreams to support its implementation.
- Driving value for the Ford family is a continuous process: revisiting family goals and advisor roles during annual/bi-annual planning; executing the plan; assessing value; taking action; and then beginning the process again.

"You've got to listen to understand, not respond."
– Michael Montgomery

TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

Rising Gen Perspectives: What We Want Our Parents to Know

PANELISTS



Nate Hamilton
Advisory Board
Member,
Family Office Exchange



Stephanie Hammett
NextGen, ChiFam, LLC



Jessica Swoyer Green
Family Council Chair,
The Duchossois Family

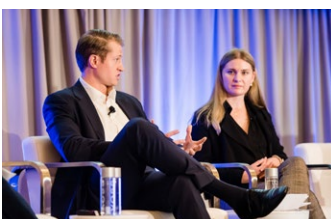


Shivani Trivedi
Vice President,
Trivedi Family Office &
Foundation

MODERATOR



**Mindy Kalinowski
Earley, CMP, CFBA**
Chief Learning Officer,
Family Office Exchange



SESSION DESCRIPTION

A panel of rising generation family members talked about how they’re working with their leadership generations to demonstrate their capabilities and share their perspectives on the challenges and opportunities facing their families. They discussed what they want to learn and how best to engage their generation.

KEY INSIGHTS

- Each of the panelists has some level of Family Office involvement or were active in family governance. Some have leadership roles in their family council or advisory board. Everyone described wanting to contribute to the wellbeing of their respective families.
- Family meetings are an integral part to keeping the communication lines open and learning more about a family’s story. Education can be as hands on as internships in the family business to a more self-directed approach. What is important is being clear about the prior generations’ expectations of the next one.
- Finding one’s voice is incredibly important. While initial Family Office exposure may be intimidating, acclimation is a gradual process. A next-gen family member can ease themselves into it by taking time to learn, meet with business leadership and employees, and routinely meet with a mentor who can lead the way to more robust involvement.
- The best way to engage the rising generation is to play to their interest and strengths. A family member passionate about writing can head up the family newsletter. A member with an interest in theater can produce a family history video. If the younger generation is given a Family Office assignment in the platform of their interests, they will be more engaged.
- The panel identified education, succession, and spousal onboarding as challenges for the next five years. All agreed that actions should honor the oldest and welcome the youngest to drive multi-generational involvement.

“Participating in internships across several of the operating businesses helped me to fall in love with these businesses and to want to stay a part of it.” – Stephanie Hammett

TABLE OF CONTENTS

TUESDAY, OCT. 29

WEDNESDAY, OCT. 30

FOX 100

EXHIBITORS

2020 FORUM DATES

FOX 30th Anniversary Forum Moments

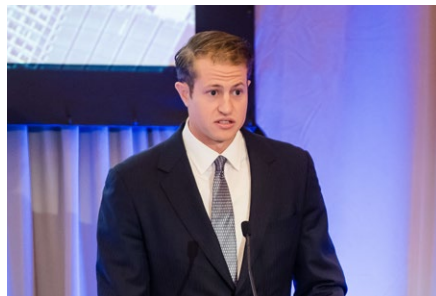





TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

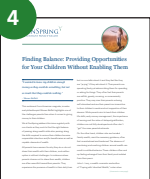
The Top FOX 100


FOX 100 is our annual showcase of articles and whitepapers. Below are the most popular pieces based on results from the FOX 30th Anniversary Forum. Click the image or title to view the article.


- 


1 The Philanthropy Framework
Rockefeller Philanthropy Advisors
- 


2 Family Governance: Oxymoron or Opportunity?
Ascent Private Capital Management
- 


3 You Can't Always Get What You Want: Talking with Children about Wealth and Entitlement
First Republic Private Wealth
- 


4 Finding Balance: Providing Opportunities for Your Children Without Enabling Them
GenSpring | SunTrust Private Wealth
- 


5 The Global Risks Report 2019
Marsh & McLennan Companies and World Economic Forum
- 


6 Developing a Family's Values, Vision & Mission Statement: "The Cornerstone Statement"
Northern Trust
- 


7 Megatrends: The Future of Work
Vanguard Flagship Select
- 

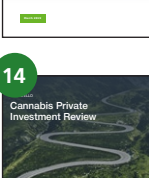
8 The Challenges of Shared Ownership
Family Office Exchange
- 


9 Wealth Planning With Art
Northern Trust
- 


10 2019 Guide to Tax and Wealth Planning
PwC Private Company Services
- 


11 Direct Investments
NEPC
- 


12 Philanthropy and the SDGs: Practical Tools for Alignment
Rockefeller Philanthropy Advisors
- 

13 Cybersecurity for the Entire Family: Five Surprising Ways Kids and Adults Get Hacked
Plante Moran
- 

14 Cannabis Private Investment Review
Poseidon Asset Management
- 

15 Capturing Opportunity and Managing Risk in the Next Decade
Family Office Exchange
- 

16 Year 2019: 10-Year Capital Market Return Assumptions
BNY Mellon Wealth Management
- 

17 A Positive Approach to the Prenuptial Agreement Discussion
Warner Norcross & Judd
- 

18 Private Investing for Private Investors: Life Can Be Better After 40(%)
Cambridge Associates

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TABLE OF CONTENTS	TUESDAY, OCT. 29	WEDNESDAY, OCT. 30	FOX 100	EXHIBITORS	2020 FORUM DATES
-------------------	------------------	--------------------	---------	------------	------------------

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To learn more about our exhibitors, click on the logos below to view each firm's brochure.



Congratulations to our Raffle Winner! Nancy Larson, Anderson Financial Corporation



TABLE OF CONTENTS

TUESDAY, OCT. 29

WEDNESDAY, OCT. 30

FOX 100

EXHIBITORS

2020 FORUM DATES

For Your Calendar: 2020 FOX Forums

To be notified when registration opens for an event, please click the image or title below to sign-up for event notifications.

FOX FORUMS

Conference-style member events that provide insights from industry leaders on timely topics and rich opportunities for peer networking.



FOX Wealth Advisor Forum

March 31 - April 1, 2020
TBA



FOX Family Office Forum

July 14 - 15, 2020
Chicago



FOX Global Investment Forum

May 12 - 13, 2020
New York



FOX Family Forum

October 26 - 28, 2020
Chicago

FOX RISING GEN FORUMS

Interactive experiences designed to bring together rising generation family members for learning, peer exchange, and discussion of relevant leadership topics.



FOX Rising Gen Forum Spring

April 3 - 4, 2020
TBA



FOX Rising Gen Forum Fall

October 25 - 26, 2020
Chicago

Program topics, dates, and locations are subject to change. For the most up-to-date information, please visit our website at www.familyoffice.com or contact your relationship manager.

For more information on upcoming
FOX Learning Programs, please visit:
www.familyoffice.com/learning-programs

