

# 2024 Learning Programs – Global Listing

■ Event will be held in-person

■ Event will be held virtually

■ Event will be held in-person and virtually

## JANUARY

Jan 11 | *Virtual*

Technology Resource  
Partner Focus Group:  
*Ledgex*

Jan 17 | *Virtual*

Public Webcast: *The  
Future of Family Wealth*

Jan 22-26 | *Miami, FL*

ROEF Academy: 2023/2024  
Cohort - Module 4

Jan 23-25 | *Virtual*

Private Trust  
Company Workshop

Jan 31-Feb 1 | *Chicago, IL*

Thought Leaders  
Council

## FEBRUARY

Feb 1 | *Virtual*

Technology Resource  
Partner Focus Group:  
*Libretto*

Feb 2 | *Virtual*

Member Town Hall

Feb 6-8 | *Coral Gables area, FL*

Executive Council '14

Feb 8 | *Virtual*

Risk Management  
Member Meeting

Feb 21-23 | *Virtual*

Winter Technology  
and Risk Management  
Partner Days

Feb 27-29 | *Coral Gables, FL*

Executive Council '04

Feb 28 | *Virtual*

Webcast: *Who Am I and  
Where Do I Fit? The  
Dilemma of the Rising  
Generation*

## MARCH

Mar 6 | *Virtual*

Webcast: *2024 Global  
Economic Outlook*

Mar 7 | *Virtual*

Technology Resource  
Partner Focus Group:  
*Deviante Consulting*

Mar 13 | *Virtual*

Webcast: *Highlights of the  
2024 Heckerling Institute  
on Estate Planning*

Mar 20 | *Virtual*

Webcast: *It's Here,  
Now What?: Corporate  
Transparency Act  
Updates*

Mar 21 | *Virtual*

Partner Webcast:  
*Succession and Transition  
Planning: Actionable  
Strategies for Preserving  
Wealth and Enhancing  
Value*

Mar 21 | *Virtual*

ROEF Academy: 2023/2024  
Cohort - Module 5

Mar 20-21 | *Coral Gables area, FL*

Integrated Wealth  
Advisor Council

Mar 26 | *Virtual*

FOX Roundtable: *The  
India Opportunity:  
Generating Alpha in  
Indian Listed Equities*

## APRIL

Apr 4 | *Virtual*

Technology Resource  
Partner Focus Group:  
*Fi-Tek Wealth Solutions*

Apr 10 | *Virtual*

Public Webcast: Estate  
Planning Nuances During  
an Election Year

Apr 12-13 | *Denver, CO*

Rising Gen Leadership  
Program: *Ruby Edition*

Apr 17 | *Virtual*

Premier Partner  
Technology and Risk  
Management Day

Apr 18 | *Virtual*

ROEF Academy: 2023/2024  
Cohort - Module 6

Apr 24 | *Virtual*

Family Advisor Training  
Program: *Pre-Session 1*

Apr 25 | *Virtual*

Partner Webcast:  
How to Meet the One in a  
Digital World

Apr 25-26 | *Amsterdam, Netherlands*

Global Family  
Enterprise Council

## MAY

May 1-2 | *New York, NY*

Multi-Family Office Council

May 7 | *Miami, FL*

Blockchain Roundtable

May 7 | *Miami, FL*

Direct Investing Dinner

May 7-8 | *Miami, FL*

Global Investment Forum

May 8 | *Virtual*

Family Advisor Training  
Program: *Pre-Session 2*

May 8-9 | *Miami, FL*

Strategic CIO Council

May 14-16 | *Location TBD*

Owner Operator Council

May 15 | *Virtual*

Webcast: *Attracting and  
Retaining Talent and Creating  
an Engaging Culture*

May 15-16 | *Chicago, IL*

Family Advisor  
Training Program

May 20 | *Virtual*

Risk Management  
Member Meeting

May 21-23 | *Guatemala*

Emerging Family  
Enterprise Summit

May 21-23 | *Location TBD*

Senior Management  
Council

May 23 | *Virtual*

Technology Resource  
Partner Focus Group:  
*Masttro*

May 27-31 | *Amsterdam, Netherlands*

ROEF Academy: 2023/2024  
Cohort - Module 7

May 31 | *Virtual*

Member Town Hall

## JUNE

Jun 5-6 | *Virtual*

Trustees & Beneficiaries  
Workshop

Jun 12 | *Virtual*

Webcast: *Strategies for  
Developing Early Career  
Professionals*

Jun 18 | *Virtual*

Partner Webcast:  
*Supporting Family Mental  
Health*

Jun 25-28 | *Virtual*

Family Office  
Design Workshop

Jun 26 | *Virtual*

Family Advisor Training  
Program: *Post-Session*

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## JULY

Jul 15-17 | *Chicago, IL*

Family Office & Wealth  
Advisor Forum

Jul 30 | *Virtual*

Risk Management  
Member Meeting

Jul 31 | *Virtual*

Webcast: *Positively  
Impacting Wellbeing Across  
Families and Businesses*

## AUGUST

Aug 1 | *Virtual*

Technology Resource  
Partner Focus Group:  
*Summitas*

Aug 22 | *Virtual*

Technology Resource  
Partner Focus Group

Aug 27 | *Virtual*

Family Advisor Training  
Program: *Pre-Session 1*

## SEPTEMBER

Sep 5 | *Virtual*

Technology Resource  
Partner Focus Group

Sep 6 | *Virtual*

Member Town Hall

Sep 9 | *New Orleans, LA*

Technology Selection  
Workshop

Sep 10-12 | *New Orleans, LA*

Technology Showcase

Sep 10 | *Virtual*

Family Advisor Training  
Program: *Pre-Session 2*

Sep 11 | *Virtual*

Webcast

Sep 18-20 | *Chicago, IL*

Building an Enduring  
Enterprise Family  
Worksho

Sep 18 | *Virtual*

Webcast

Sep 18-19 | *Dallas, TX*

Family Advisor  
Training Program

Sep 20 | *Virtual*

Maximizing the Value of  
your FOX Membership

Sep 23-25 | *London*

Global Family  
Enterprise Council

Sep 30-Oct 2 | *Phoenix, AZ*

Executive Council '04

Sep 30-Oct 4 | *Amsterdam*

ROEF Academy: 2024/2025  
Cohort - Module 1

## OCTOBER

Oct 2 | *Virtual*

Webcast

Oct 3 | *Virtual*

Technology Resource  
Partner Focus Group

Oct 9-10 | *Virtual*

Risk Management Summit

Oct 27 | *Atlanta, GA*

Direct Investing  
Network Dinner

Oct 27-28 | *Atlanta, GA*

Rising Gen at  
Family Forum

Oct 28-30 | *Atlanta, GA*

Family Forum

## NOVEMBER

Nov 5 | *Virtual*

Family Advisor Training  
Program: *Post-Session*

Nov 7 | *Virtual*

Technology Resource  
Partner Focus Group

Nov 12 | *Virtual*

Risk Management  
Member Meeting

Nov 13 | *Virtual*

Webcast

Nov 18-21 | *Virtual*

Family Office  
Design Workshop

## DECEMBER

Dec 4 | *Virtual*

Webcast

Dec 6 | *Virtual*

Member Town Hall