

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: *Deviate 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*

Webcast

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 25-26 | *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

May 15-16 | *Chicago, IL*

Family Advisor Training Program

May 17 | *Virtual*

Member Town Hall

May 20 | *Virtual*

Risk Management Member Meeting

May 21-23 | *Guatemala*

Emerging Family Enterprise Summit

May 21-23 | *Location TBD*

Senior Management Council

May 22 | *Virtual*

Webcast

May 23 | *Virtual*

Technology Resource Partner Focus Group: *Mastro*

May 27-31 | *Amsterdam, Netherlands*

ROEF Academy: *2023/2024 Cohort - Module 7*

JUNE

Jun 5-6 | *Virtual*

Trustees & Beneficiaries Workshop

Jun 6 | *Virtual*

Technology Resource Partner Focus Group

Jun 12 | *Virtual*

Webcast

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 and
Wealth Advisor Forum

Jul 30 | *Virtual*

Risk Management
Member Meeting

Jul 31 | *Virtual*

Webcast

AUGUST

Aug 1 | *Virtual*

Technology Resource
Partner Focus Group

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 10 | *Virtual*

Family Advisor Training
Program: *Pre-Session 2*

Sep 11 | *Virtual*

Webcast

Sep 16-20 | *Amsterdam*

ROEF Academy: *2024/2025
Cohort - Module 1*

Sep 18 | *Virtual*

Webcast

Sep 18-19 | *Dallas, TX*

Family Advisor
Training Program

Sep 20 | *Virtual*

Maximizing the Value of
your FOX Membership

Sep 24-25 | *Virtual*

Risk Management Summit

Sep 24-26 | *London*

Global Family
Enterprise Council

OCTOBER

Oct 2 | *Virtual*

Webcast

Oct 3 | *Virtual*

Technology Resource
Partner Focus Group

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

DECEMBER

Dec 4 | *Virtual*

Webcast

Dec 6 | *Virtual*

Member Town Hall