Family Office Exchange

FOX Wealth Advisor Forum™

Managing Disruption

May 2-4, 2017 | Swissôtel | Chicago

The wealth advisor business is in the throes of unprecedented change. This year's **FOX Wealth Advisor Forum**™ will explore the trends and transformations that are disrupting "business as usual" and requiring significant reassessment of how advisors do business. At the same time, opportunities abound and those who can innovate within their business are more likely to survive and thrive in the disruptive environment.

At the event, the experts' input and your conversations with your peers will provide powerful insights on how you can best position your firm for success in 2017 and the years to come.

Join us on May 2-4, as this Forum returns to Chicago for a stimulating and rewarding learning and networking experience with the industry's top advisors.

Exhibitors

ARCHWAY | WHEELS UP™

Please note: speakers, sessions, and times are subject to change.

Family Office Exchange

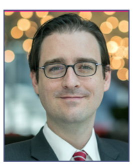
Guest Presenters

Sam Barnett, PhD
Chief Executive Officer, SBB Research Group Lead Investment Strategist, Medline Industries, Inc.

Benjamin Bingham
Author, Making Money Matter, Impact Investing to Change the World, CEO/Founder 3Sisters Sustainable Management, LLC and Scarab Funds

Sally Hogshead
New York Times Bestselling Author, Hall of Fame Speaker, Creator of the Fascination Advantage® Assessment

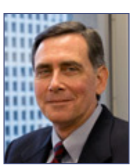
Maribeth Kuzmeski, PhD
Author and Founder, Red Zone Marketing



Michael McDonough
Global Director of Economic Research & Chief Economist, Bloomberg LP

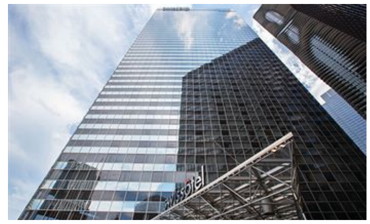
FOX Presenters

Amy Hart Clyne
Executive Director, Knowledge Center
Family Office Exchange



David Toth
Director of Advisor Research
Family Office Exchange

Location



Swissôtel
323 East Wacker Drive
Chicago, IL 60601

1.888.73.SWISS

www.swissotelchicago.com

FOX has reserved a limited number of rooms at the Swissotel Chicago at a rate of $279 per night plus applicable taxes (currently 17.4%). To obtain this discounted rate, please contact the Swissotel Chicago directly at **1.312.565.0565** or toll-free at **1.888.73 SWISS** and mention the **FOX (Family Office Exchange) Wealth Advisor Forum** or complete your reservation online at: https://aws.passkey.com/go/foxwaf. You may access this link from the Family Office Exchange Website: www.familyoffice.com.

Forum attendees are responsible for making their own accommodation arrangements. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is **Wednesday, April 5, 2017**.

Tuesday, May 2 Agenda

Pre-Forum Golf Outing at The Glen View Club
(Tickets required)

Michael Brink
MEMORIAL GOLF OUTING

We hope you will be able to join our wealth advisor members and FOX staff for a game of golf, networking and fellowship followed by the Forum Welcome Reception at the Swissôtel Chicago.

The cost is $295.00 per person. Your fee includes round-trip shuttle service from the Swissôtel to The Glen View Club, a luncheon, golf cart, practice balls, drinks on the beverage carts and halfway house. Club rental is $50.00 and will be arranged and paid for separately through the golf course.

11:00 am Shuttles Depart
From the Swissôtel to The Glen View Club

12:00 pm Golf Luncheon

1:00 pm Golf Begins

6:00 pm Shuttles Depart
From The Glen View Club to Swissôtel

6:30 pm Forum Welcome Reception for all Attendees
At Swissôtel Chicago

7:30 am Registration Opens and Breakfast

8:30 am Welcome/FOX Trends/Industry Update

Presenter: Amy Hart Clyne, Executive Director, Knowledge Center, Family Office Exchange

Identifying trends and issues having an immediate and future impact on families of wealth is the focus of much of the research at Family Office Exchange. Gain insights on the trends emerging in the family wealth industry.

9:30 am Disruptions for Good

Presenter: Benjamin Bingham, Author, Making Money Matter, Impact Investing to Change the World, CEO/Founder 3Sisters Sustainable Management, LLC and Scarab Funds

You hear it repeatedly, Millennials and Women are set to inherit $41T in the next 10 years. What does this mean to your practice? What needs to change? What tools do you need and what resources are out there to meet new demands for investment with conscience? How can ethics compete with robo-advisors and algorithmic trading platforms? What will it take for you to earn trust? This is not a new movement but it is gathering momentum. This session will provide a brief historical overview but will focus on what is happening now and how to prepare for "good" disruptions that are likely to last.

10:30 am Morning Networking Break

11:00 am Discovering How and Why Your Natural Advantage of Persuasion Matters Most During Disruptive Times

Presenter: Sally Hogshead, New York Times Bestselling Author, Hall of Fame Speaker, Creator of the Fascination Advantage® Assessment

What separates certain professionals from the rest of the pack, particularly in disruptive times as we're in now? Is it skill, or knowledge, especially during? Is it expertise, or seniority? Or is it simply charisma? By taking the Fascination Personality Assessment you'll have access to a decade of research on how you can add value in business. Gain insights on a new way to measure how people perceive your personal style of communication through the following:

- Explanation on how the Fascination Advantage® system works
- Descriptions of the characteristics of each Fascination Advantage
- Applying the Fascination Advantages to real client/work situations
- How to recognize communication "red flags" and how to avoid them

12:00 pm Luncheon

1:15 pm How the Fascinate® System Applies to Your Team and Decreases Client Confusion

Presenter: Sally Hogshead, New York Times Bestselling Author, Hall of Fame Speaker, Creator of the Fascination Advantage® Assessment

After taking the crash course in YOU and developing your personal brand, your assets, your key differences, Sally will show you how the results of your personality assessment are relevant to the success of your team. This session will help your team develop skills on:

- Solving problems, dealing with conflict and achieving results
- How to build a 'Heat Map' to visually describe the advantages of a team
- How to analyze a team's advantage, weakness, blind spots and opportunities

Together, both sessions will allow you to make stronger first impressions, build more powerful relationships, increase influence and impact, and improve communication with your clients to increase overall team effectiveness.

2:05 pm Afternoon Networking Break

2:30 pm Peer Dialogues: Round One

Join your peers in high-level, face-to-face roundtable discussions about topics of most concern to wealth advisors. Each session will be facilitated by a member of the FOX team in order to share ideas and solutions for better decision-making and advice in the year ahead.

3:10 pm Peer Dialogues: Round Two

3:45 pm Afternoon Networking Break

4:00 pm Marketing Magnetism: Strategies for Acquiring New Business through the Power of Exceptional Client Communication in Times of Disruption

Presenter: Maribeth Kuzmeski, PhD, Author and Founder, Red Zone Marketing

Maintaining successful communication during disruptive times as we've all experienced this year, requires a strategic approach of knowing how and when to reach out to clients via email, text, phone, or face-to-face meetings. One of the nation's top consultants to wealth advisors will provide insights on improved ways to manage client expectations by being able to identify and respond to disruptive events proactively and through the correct messaging tools aligned with a family's generational perception of information supported by your team's unique marketing approach.

Wednesday, May 3 Agenda

6:00 pm Reception and Dinner

This year's Wealth Advisor Forum Dinner will take place at the Chicago Athletic Association Hotel, Chicago's celebrated 1890s athletic club, which has been reborn as a bustling Michigan Avenue hotel playground. Join us in the beautiful and historic White City Ballroom, with old world design and breathtaking views of Millennium Park, for an evening of networking and camaraderie with your peers. Shuttle service will be provided.

Photo Courtesy of Thomas Shelby

Thursday, May 4 Agenda

8:00 am Breakfast

9:00 am Disruptive Macro Forces Impacting Families of Wealth in 2017

Presenter: Michael McDonough, Global Director of Economic Research & Chief Economist, Bloomberg LP

One of the most common questions wealth advisors are hearing from clients this year is: "*What changes should I be most concerned about?*" This session will help provide knowledgeable answers based on the latest macroeconomic trends. Gain insights on the impact to investing and portfolio management to help minimize the disruption in 2017 and beyond with a spotlight on:

- Macro data - What story is it telling?
- Expected Changes to Taxes and Policies
- The latest indications of what lies ahead from President Trump
- Managing disruptions in trade, various industries, and overall business

9:50 am The Importance of the Advisor Partnership with Families of Wealth

Presenter: David Toth, Director of Advisor Research, Family Office Exchange

New FOX research indicates that families are getting more out of their advisor relationships than ever before as this strategic partnership helps them navigate transitions and better prepare for the many complex issues faced. Discover how successful advisors are positioning themselves to help families operate in an increasingly complex and unpredictable global environment in the groundbreaking "Strengthening the Partnership" research focusing on:

- Why advisors should build a "Partnership Culture"
- What partnerships look like and how they operate within a family/advisor ecosystem
- Steps advisors can take to strengthen their present and future partnerships

10:40 am Morning Networking Break

11:10 am Voice of the Wealth Owner: Brains and Family Business - Active Research in Disruptive Times

Presenter: Sam Barnett, PhD, Chief Executive Officer, SBB Research Group, Lead Investment Strategist, Medline Industries, Inc.

How do families manage dynamic–and often disruptive–environments? Sam Barnett, a neuroscientist and mathematician, shares how he approaches changing times with active research. His family has been innovating for over a century and has seen its business evolve from a Chicago garment factory to America's largest provider of medical supplies and solutions. Today, Sam and his team study diverse signals from brains, markets, web sites, and other sources to understand how advertisements influence consumer minds and how unusual data can forecast stock market behavior.

12:00 pm Event Concludes

Lunch will be provided.

FOX Wealth Advisor Forum™ Registration

May 2-4, 2017 | Swissôtel | Chicago, IL

Family Office Exchange®

Registration Questions

All registrations subject to approval by FOX.

Is this your first time at the FOX Wealth Advisor Forum?

❍ Yes ❍ No

Do you plan to book a guest room at Swissôtel Chicago?

❍ Yes, I plan to stay at Swissôtel.
❍ No, I do not plan to stay at Swissôtel.
❍ I'm not sure, my plans are not finalized.

Please note, registrants are expected to make their own hotel reservations. Please see page two for accommodation information.

Do you have any special dietary or accessibility needs? (please describe)

If you were referred to this event, please advise who referred you.

What key takeaway do you hope to gain at the FOX Wealth Advisor Forum?

Which two topics would you like to discuss in peer-to-peer dialogues?

(Please select or write in your top two choices)

❍ Client Servicing
❍ Talent Management
❍ Price Value
❍ Business Development Strategies
❍ Other________________________________
❍ Other________________________________

In your opinion, what do you think is fueling disruption concerns the most in 2017?

What are the two biggest changes your clients are concerned about this year?

In order to enhance the networking during the Wealth Advisor Forum, FOX will provide attendees with a custom list of members to seek out during the Forum.

Please note that to participate, you must allow us to distribute your name and contact information, as submitted with your registration for this event.

Check one:

❍ I would like to participate in this networking activity, FOX has my permission to distribute my contact information.

❍ I decline the opportunity to participate, please do not distribute my contact information.

Will you attend the following:

❍ The Welcome Reception on May 2?
❍ Breakfast on May 3?
❍ Lunch on May 3?
❍ The Forum Dinner on May 3?
❍ Breakfast on May 4?

Questions?

Contact us at events@familyoffice.com or call **312.327.1221**

Three Ways To Register

1. **Scan and email** to: events@familyoffice.com
2. **Register online** at: www.familyoffice.com/waf
3. **Fax this form** to: 1.312.327.1212

Space is limited. All attendees must register online or submit this registration form prior to the event to secure a seat.

Attendee Information

Name (First/Last)

Name of Firm/Family Office

Title/Position

Street Address

City *State/Province*

Country *Zip/Postal Code*

Phone

E-mail

Registration Fees

FOX Member	**FOX Member**
☐ Use Event Credit Included in FOX Membership Fee	☐ **$1,850**
	Additional Attendees ☐ **$1,500**

Forum Materials

❍ **I would like to download the materials in advance and will NOT need a binder.**

❍ **I would like to receive materials in a binder at the forum.**

Additional binders will not be available at the Forum.

If you are not a member of Family Office Exchange, please contact **info@familyoffice.com** or call **312.327.1247** to receive information on membership.

Pre-Forum Golf Outing at The Glen View Club

Michael Brink MEMORIAL GOLF OUTING

Golf Registration Fee

☐ **$295** ☐ **I plan to rent golf clubs at The Glen View Club.***

*Please note the $50.00 club rental will be arranged and charged by The Glen View Club separately from FOX's registration for this event.

Payment Method

❍ Payment by check is enclosed. *(Check payable in U.S. dollars to Family Office Exchange)*

Please mail check to: **Family Office Exchange**
ATTN: Events
100 South Wacker Drive, Suite 800, Chicago, IL 60606

❍ Please charge the following credit card: ❍ VISA ❍ MasterCard ❍ Am. Express ❍ Discover

Cardholder Name

Card Number *Expiration Date* *Security Code*

Billing Address for Credit Card

City *State/Province* *Zip/Postal Code* *Country*

Cardholder's Signature

For event registrations, refunds of payment or forum allotments will be offered if the cancellation is made in writing to Family Office Exchange at events@familyoffice.com five (5) or more business days prior to the start of the event. For more information regarding complaints or administrative policies please call 312-327-1200.

NATIONAL REGISTRY OF CPE SPONSORS

Family Office Exchange is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.

Field of Study: **Finance** - Up to **8 CPE credits** can be earned by attending this event. CPE credits are accepted at the option of state certifying boards. Requirements, compliance procedures and acceptance may vary by state.

Program Level: **Overview** | **No prerequisites are required for any of the sessions.** | Delivery Method: **Group Live Program**

Learning Objectives: Upon completion of the program, participants will be able to identify the macroeconomic trends that are impacting investing and portfolio management, expected changes to taxes and policies and gain a better understanding of the importance of the advisor partnership with families of wealth.

Family Office Exchange®

100 South Wacker Drive, Suite 800 ▪ Chicago, IL 60606 USA ▪ 1.312.327.1200
New York, NY ▪ 1.646.504.0776 | San Francisco, CA ▪ 1.312.327.1265
Madrid, Spain ▪ 34.616.94.05.63 | Sydney, Australia ▪ 61.414.444.405
info@familyoffice.com ▪ www.familyoffice.com