

SECOND ANNUAL

FOX Global Owners Forum™

March 2-3, 2017 | The Breakers | Palm Beach, FL



Photo Courtesy of The Breakers Palm Beach, Inc.

The **FOX Global Owners Forum™** returns in March 2017 to guide families on their enterprise journey. This event is programmed specifically for family members.

This is a unique opportunity for family members to meet with members of families like themselves to discuss their experiences and challenges in guiding families of wealth. FOX will frame the discussions to focus on establishing a unified family vision, planning for succession, and preparing the rising generations.

The forum will give owners an occasion to think about those long term issues...to meet peers with whom they share common goals...learn from families who are wrestling with similar transitions...and to hear from experts on key issues for the enterprise family.

Please join us for an experience that puts your concerns at the forefront of stimulating, engaging, and action-oriented peer discussion. You do not want to miss out on such a unique opportunity.

Guest Speakers and Panelists

Claudia Aguirre, Ph.D.

Neuroscientist and Mind-Body
Expert

Denise Bober

Vice President, The Breakers Palm
Beach, Inc.

Daniel S. Bowman

Family Office Executive, Tibbetts
Family Holding Company, LLC

Francesco D'Amico

Executive Committee, Quilvest
Switzerland Ltd

Bryan Dunn

CEO, Kinship Trust Company

Dawn Fuchs

Managing Director, The
Weavertown Group, 2G
Member of Founding Family of
Weavertown LLC

Robert Hammett

Vice President, Chifam LLC, 5G
Member of the Cowles Family

Karen Harris

Managing Director, Macro Trends
Group, Bain & Company

James E. Rooney

Principal and Co-Founder, FirstLink,
3G Member of Founding Family of
the Pittsburgh Steelers

Stephanie Rooney

Chairwoman and Co-Founder,
FirstLink

Lynne Twist

Author, The Soul of Money

8:00 am Registration Opens/
Continental Breakfast

9:00 am FOX Opening Remarks – What Makes a Family Enterprise Successful



Sara Hamilton

Presenter: Sara Hamilton, Founder and CEO, Family Office Exchange

The management of multiple businesses, properties and trusts calls for a sophisticated and dynamic enterprise model. Engaging family members to agree on the elements comprising a family’s guiding principles and future vision is essential to finding a successful approach to:

- Shaping goals for the enterprise plan
- Developing key strategies for the family’s action plan
- Achieving a customized family enterprise model that is embraced by family members

9:50 am Keeping the Entrepreneurial Spirit Alive in the Family Enterprise



Ann Dugan

Moderator: Ann Dugan, Senior Managing Director – Consulting, Family Office Exchange

Panelists: Dawn Fuchs, Managing Director, The Weavertown Group, 2G Member of Founding Family of Weavertown LLC; Robert Hammett, Vice President, Chifam LLC, 5G Member of the Cowles Family; James E. Rooney, Principal and Co-Founder, FirstLink, 3G Member of Founding Family of the Pittsburgh Steelers; Stephanie Rooney, Chairwoman and Co-Founder, FirstLink



Dawn Fuchs



Robert Hammett



James Rooney

Interest in entrepreneurship remains highly relevant for FOX owners worldwide, particularly within rising generations. In response, family leaders try to balance the needs of their family enterprise while simultaneously fostering opportunities for individual family members who express an entrepreneurial interest. Such aspirations may include starting a new business, often inspiring the family’s enterprising spirit.



Stephanie Rooney

Discover how four family entrepreneurs were able to influence and cultivate the creation of new businesses, expansion within industries, as well as a host of new opportunities.

10:45 am Networking Break

11:15 am Breakout Session Preview

Gain insights on the five breakout sessions coming up after lunch before taking a deeper dive in the topic of choice as each breakout presenter provides a glimpse into: governance, cross cultures in families, FOX research on the partnership between families and their advisors, integrating family health and how to get the most out of your family office.

12:00 pm Luncheon

1:30 pm Breakout Sessions
Please choose one of the following three breakouts.

Breakout 1 Building Trust in Families Through Governance Structures for Family Enterprises



Francesco D'Amico

Panelists: Francesco D’Amico, Executive Committee, Quilvest Switzerland Ltd; Bryan Dunn, CEO, Kinship Trust Company; Sara Hamilton, Founder and CEO, Family Office Exchange



Bryan Dunn

Learn about best practices of families who properly manage the critical dimensions of governance and operating structures within their family enterprise:

- Aligning family goals with governance structures
- Creating a family board and assigning responsibilities
- Developing leadership succession programs

Breakout 2 How to Get the Most Out of Your Family Office



Daniel Bowman

Presenter: Daniel S. Bowman, Family Office Executive, Tibbetts Family Holding Company, LLC

In order to achieve control, security, and quality within your family office, some key decisions need to be reached such as:

- Developing financial independence for family members
- Educating them about responsible ownership and governance
- Keeping your family office team energized and engaged

Family office executives share their insights on where the attention should be focused for optimal success.

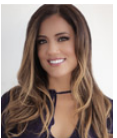
Breakout 3 Integrating Wellness within Family Homes and the Neuroscience Behind Reducing Travel Stress



Denise Bober

Presenters: Denise Bober, Vice President, The Breakers Palm Beach, Inc.; Claudia Aguirre, Ph.D. Neuroscientist and Mind-Body Expert

Shifting between seasonal family homes and traveling for business or pleasure can easily disrupt your family’s health and daily fitness routine. Gain insights on how to maintain healthy behaviors from The Breakers’ wellness expert who will share insights on maintaining your energy throughout the day, the importance of hydration and what to do when there’s no time for exercise. A top neuroscientist joins to share research on how mindfulness-based stress reduction techniques such as meditation, serve as effective ways to lower stress levels, reduce anxiety and depression, and promote emotional well-being. You’ll gain access to the latest research on the importance of sleep, how to recover faster from jet-lag, and the significance of the air within your home – could it be making you sick?



Claudia Aguirre

2:45 pm Networking Break

3:15 pm Owner Dialogue Sessions

- Families Active in Direct Investing
- Families Focused on Business Succession
- Families Committed to Building Enterprises
- Families Focused on Philanthropic Impact

4:45 pm Adjournment

7:00 pm Reception & Dinner at The Breakers on the Lawn

Comments from the FOX Global Owners Forum held in December, 2015

“Excellent. I was able to meet and talk to others in an exceptional environment.”

“It is a fantastic opportunity to listen and learn about what other families in similar situations (to your own) have done. You also get to meet a lot of other families with which you can discuss. You can even find partners for future investments.”

8:00 am Continental Breakfast

9:00 am **The Great Transformation: A Shifting Economic Climate**



Karen Harris

Presenter: Karen Harris, Managing Director, Macro Trends Group, Bain & Company

Family Enterprises will be transformed by a shifting economic climate. Recent historic votes in major countries around the world are causing ripple effects which Macro Economist, Karen Harris, believes will unleash new waves of growth and decline. Her research predicts a new set of winners and losers over the next decade. Trends of regionalism and populism will be profound as risk premiums rise, global institutions lose trust, and tech innovations change the way things work. This confluence of emerging trends must be understood so that you can position the complex moving parts of your family enterprise to remain at the leading edge. Don't miss this powerful research-based understanding of our new economic reality.

10:00 am Networking Break

10:30 am **Disruptions in the Investment Industry and the Future of Alpha**



Kristi Kuechler

Presenter: Kristi Kuechler, President, Private Investor Center, Family Office Exchange

Discover the investment trends that sophisticated investors are adapting to as they continue to seek robust returns for their families. Some of the trends discussed will include:

- The commoditization of long-only equity
- New thinking in asset allocation
- Reassessment of hedge funds
- Reconsidering private equity

11:30 am **The Soul of Money**



Lynne Twist

Presenter: Lynne Twist, Author, The Soul of Money

In today's "money culture," everyone experiences fear, constraint, and misunderstanding around money at some point in one's lifetime. By looking at our own financial "story" and the ways our beliefs may have limited and constricted our relationship with money, we can re-conceptualize money.

Lynne Twist, author of the best-selling book, "The Soul of Money," offers new pathways to realign our relationship with money through:

- Appreciating the power and presence of your existing resources
- Gaining an appreciation of your inherent completeness, regardless of your current economic circumstances
- Experiencing a new sense of freedom and joy in your relationship with money

12:30 pm **Networking Luncheon and Adjournment**



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.

Registration for this event is limited to Wealth Owners and Family Office Executives attending with a Wealth Owner. All registrations are subject to approval by FOX.

Registration Questions

All registrations subject to approval by FOX.

I am a...

- Family Leader/Wealth Owner
- Family Office Executive (attending with a family member)

If you are a Family Leader/Wealth Owner please select your generation:

- Gen 1 Gen 2 Gen 3 Gen 4
- Gen 5 (or greater) Unknown Not Applicable

What is your primary role within your family? (Please list all that apply)

- Matriarch/Patriarch
- Board Member
- Investment Committee Member (or other decision-maker)
- CEO (or Senior Manager) of business with responsibilities over investments
- CEO (or Senior Manager) of family office with responsibilities over investments
- Foundation Board Member
- Other

If you selected "Other" above please list your primary role and title:

Please list all the businesses that your family is currently involved with below:

Are you active in direct investments? If yes, please list industries:

- Yes No

Choose one Breakout Session on Thursday, March 2 at 1:30 pm:

- Breakout 1: Building Trust in Families through Governance Structures for Family Enterprises
- Breakout 2: How to Get the Most Out of Your Family Office
- Breakout 3: Integrating Wellness within Family Homes and the Neuroscience Behind Reducing Travel Stress
- I will not attend a breakout session

Choose one of the following Dialogue Sessions on Thursday, March 2 at 3:15 pm:

- Families Active in Direct Investing
- Families Focused on Business Succession
- Families Committed to Building Enterprises
- Families Focused on Philanthropic Impact
- I will not attend a dialogue session

Will you attend the following?

- Breakfast on Thursday, March 2
- Luncheon on Thursday, March 2
- Reception and Dinner on Thursday, March 2
- Breakfast on Friday, March 3
- Closing Luncheon on Friday, March 3

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. Fax this form to: 312.327.1212

3. Register online at: <https://www.familyoffice.com/learning-events/forums/2017-fox-global-owners-forum>

Attendee Information

Name (First/Last)

Firm Name

Title/Position

Street Address

City

State/Province

Country

Zip/Postal Code

Phone

E-mail

Registration Fees

FOX Member

First Paid Attendee

\$2,500

Additional Paid Attendee

\$2,100

Non-Member

First Paid Attendee

\$2,950

Additional Paid Attendee

\$2,550

FOX Member

Use Event Credit Included in FOX Membership Fee

Will you be staying at The Breakers during the Global Owners Forum?

(Please note, attendees are responsible for making their own accommodation arrangements for the Forum. The cutoff date for hotel reservations at this special conference rate (subject to room availability) is Friday, February 3, 2017.)

- Yes, I plan to stay at The Breakers.
- No, I do not plan to stay at The Breakers.
- I'm not sure, my plans are not finalized.

How would you like to receive your forum materials?

(Additional binders will not be available at the event.)

- 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.

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

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Cardholder Name

Card Number

Expiration Date

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Billing Address for Credit Card

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State/Province

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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.

CPE

Field of Study: **Finance** - Up to 6 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 various roles of an enterprise family, understand how to engage in entrepreneurship, gain insights on the current economic climate around the globe and recognize the value of re-conceptualizing one's relationship with money.



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