



Benefits of Membership

Family Office Association
500 West Putnam Avenue, Suite 400
Greenwich, Connecticut 06830

www.familyofficeassociation.com

*FOA seeks to provide the combination
of privacy and openness where
relationships of trust can grow*



The Family Office Association (FOA) is a global membership organization exclusive to single family offices and families of wealth. We are based in Greenwich, Connecticut but have members from all over the United States and around the world. Our membership realizes the value of coming together in a confidential setting to share ideas and compare notes. The Family Office Association seeks to provide the combination of privacy and openness where relationships of trust can grow.

The Family Office Association was started by the entreaty and with the guidance of a handful of single-family offices in Greenwich, Connecticut, who wished to have a regular and safe place to meet others with single family offices and share ideas. True to that spirit, FOA is the trusted and respected source that family offices and families of wealth can turn to for peer networking, expert resources, and fresh perspectives on how to maintain vigorous multi-generational wealth.

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Gallatin Wealth Management LLC

Adam Stern

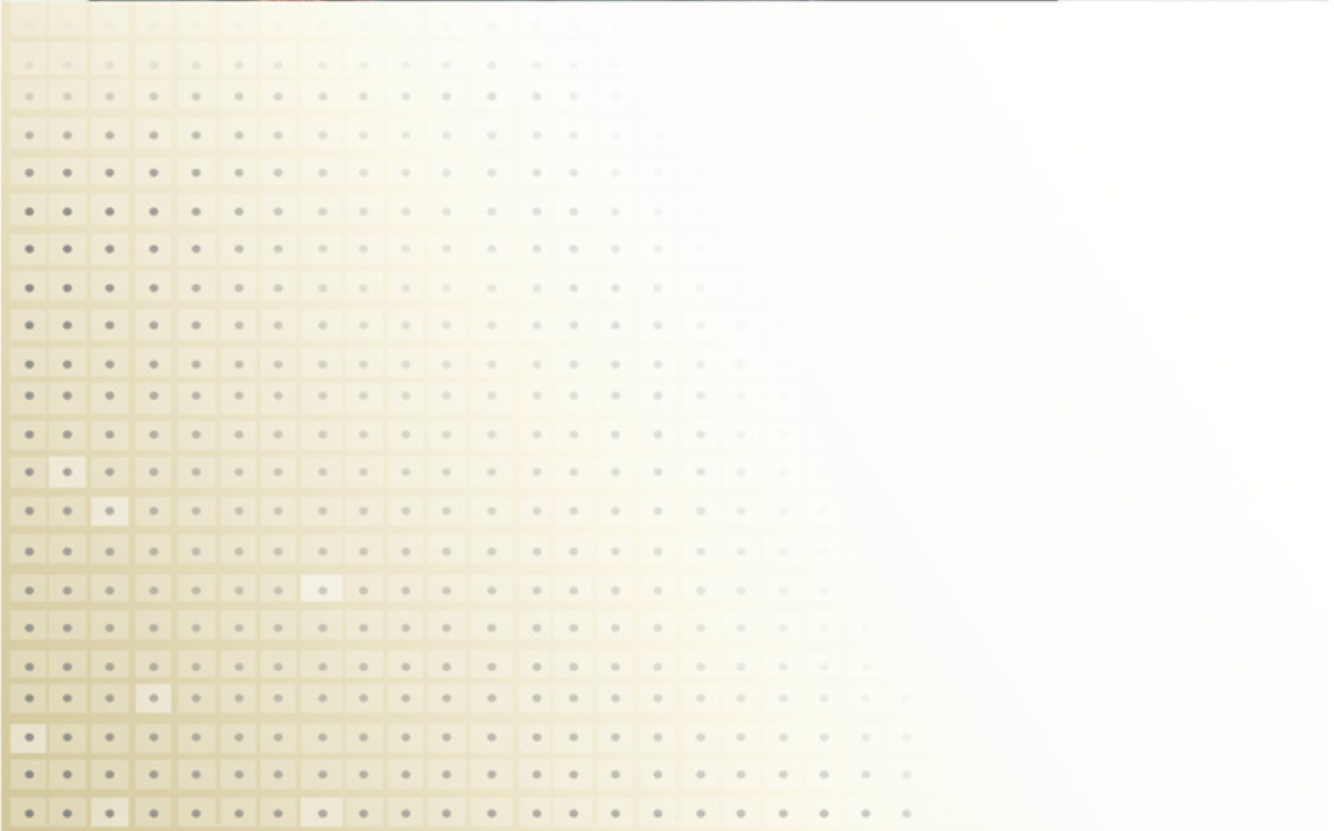
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Oakmont Family Office

Catherine Tillotson

Managing Partner &
Head of Research
Scorpio Partnership

Chauwei Yak

Managing Director
GAO Capital - Family Office



FOA is the advocate of the concept of establishing and sustaining a single family office devoted to the:

- Preservation of family wealth
- The fostering of Stewardship in the next generation
- The expansion of family philanthropic Legacy

FOA endeavors to find the best experts and notables in the family office industry to educate the membership at our Spring, Summer and Fall Summits; monthly breakfast roundtables, and member led peer-to-peer sessions. FOA has hosted such legends at our roundtables and summits as Steven Cohen, Ray Dalio, John Paulson, Mike Milken, Sam Zell, Jim Chanos, Bill Ackman, David Einhorn, Wilbur Ross, Ace Greenberg, Peter Thiel, Glenn Dubin, Jamie Dinan, Paul Singer, Joel Greenblatt, Mike Novogratz, Bruce Richards, Izzy Englander, Richard Perry, Jeff Altman, Dan Loeb, Marc Lasry, John Burbank, Larry Robbins, Thomas L. Kempner and Nassim Taleb.

MEMBERSHIP

Membership is by invitation only and is open to single family offices and families of wealth who have the capability to start a single-family office. The definition of a single family office (SFO) is at the sole discretion of FOA, but is generally an investment office dedicated to the affairs of one family.

We encourage families to reach out to us if they are interested in joining. Prospective members may inquire about consideration for an invitation and arrange an interview with a principal of FOA or a member of the membership committee.

TRANSPARENCY

The Family Office Association is proud of its transparency. FOA does not sell, refer, or recommend any investments, funds, or services of any kind. FOA is not a consultant or an advisor. FOA does not collect any revenue outside of member dues and Resource Council underwriting fees. In addition, our membership list is absolutely confidential and is never shared or published.



OUR MISSION

Family Office Association's mission is to be the most trusted and respected global membership organization exclusively focused on providing resources, education and guidance for global single family offices and individuals and families of wealth. FOA's focus is to help each member maintain multi-generational family wealth using a foundation of best practices, values, and a sense of purpose through the establishment and effective management of their own customized single family office.

Part of our mission is to encourage all family members to become involved in the goal of developing and preserving family legacy through the instrument of the single family office. To achieve this goal we have regular meetings to build community and inspire each other, while inviting notable speakers and experts who we feel will broaden our outlook and bring in the freshest and most relevant ideas in the field. These gatherings are underwritten by the FOA Resource Council, a collection of the best in the industry that we feel understand the importance of education and relationship building. We welcome the wisdom and experience of our Resource Council and like to encourage their beneficial interaction with our membership. Everyone in the Resource Council and the FOA membership agree to abide by the FOA Protocol:

The Family Office Association is a relationship-focused organization that prizes the trust developed in the privacy of a commercial-free

The Family Office Association does not sell, refer, or recommend any investments, funds, or services of any kind. FOA does not collect any revenue outside of member dues and resource council underwriting fees. Member information will be kept absolutely confidential with no exceptions.

"Now more than ever, individuals and families of wealth need to make informed decisions as well as thoughtful family leadership, mentoring and philanthropic choices. FOA is positioned to help every family or individual make timely decisions with the advice of trusted advisors, educated service providers and, most importantly, their peers to enhance their family legacies.

-- Angelo J. Robles, Founder & CEO, Family Office Association

WHITE PAPER

FOA has demonstrated the need for families of wealth to create an SFO to manage their personal finances and affairs through the white paper:

[Creating a Single Family Office for Wealth Creation and Family Legacy Sustainability.](#)

FOA's White Paper is a comprehensive look at the entire SFO life cycle. Topics addressed include the formation of a business plan and mission statement, weighing the pros and cons of different legal structures, and how to incorporate the family advisory committee.

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Now, more than ever, wealthy families need to consolidate their investments and manage their business and family affairs more efficiently, effectively and privately to sustain their wealth and preserve their legacy for generations

The often-overlooked importance of family office technology and the finding of key personnel are explored, in addition to ways to manage expenses. Guidance is provided by some examples of successful family offices that have found ways to integrate the astute and wise management of the family legacy with modern methods. A few key considerations for establishing a SFO explored in the white paper include:

1. Control

Now, more than ever, wealthy families need to consolidate their investments and manage their business and family affairs more efficiently, effectively and privately to sustain their wealth and preserve their legacy for generations.

2. Risk Management

Single family offices offer prudent and sophisticated stewardship of wealth combined with a close watch on the potential risk of the entirety of the family's investments. A family of wealth should consider an SFO to reduce risks and take advantage of new opportunities in ways that will energize the current portfolio while protecting and shielding their heritage for the future.

3. Integration

An SFO allows families to integrate wealth management and philanthropic activities as well as family governance under one roof. It is also the place where education of the family members can be coordinated to transfer values and promote family unity.

BENEFITS OF MEMBERSHIP

The Family Office Association came about from discussions we had with families of wealth and their advisors over a year ago in Greenwich, Connecticut. We felt there was a real need expressed in these informal focus groups for an organization exclusively devoted to

providing a positive networking experience and building strong connections for families and SFO professionals on the local level and beyond. We also felt there was a desire for an entity that focused on the birth, care and feeding of the single family office. If there was a place for a serious and structured exchange within a small, select membership and if we could provide the quality of content these families demand and deserve, then we might be able to supply real value and distinction for this very timely demand.

In accordance with our mission we seek to develop the best network of families and single family offices interested in building relationships of trust with each other and who also seek the best advice and resources available. We offer three significant daylong FOA Summits in the spring, summer and fall that bring together the best of new ideas and options in investments, family governance and family office best practices. We have regular breakfast and lunch meetings every month to learn from one another and hear experts share their insights on current topics. We are building a safe, encrypted and secure online network for members to discuss family office issues, share information and request referrals. They may also anonymously post questions to the resource council, which represents members of the industry who we feel are aligned with our values.

JOIN TODAY

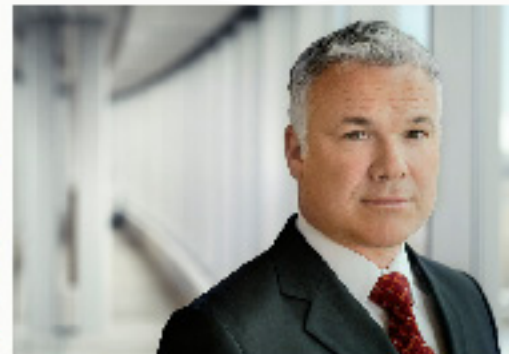
We encourage you to apply today to JOIN the Family Office Association to start benefiting immediately from our resources and collaboration with other members.

Membership is exclusive to single family office principals and executives, as well as qualifying individuals and families of wealth.



Family Office Association is limited to single family offices and individuals and families of wealth

Membership Application



Name: _____
Address: _____
City: _____
State: _____
Zip Code: _____
Telephone: _____
Email: _____
Family Office Name: _____
(if applicable)

Membership Term One Year: _____
(Choose Date "From - To")

Membership Fee Payment: _____
(Check, Credit Card or Wire Transfer)

Membership Fee: **\$3000.00** _____

Application Terms

Application to join the Family Office Association (FOA) for one year

To pay by check, please forward a check for \$3000, payable to the Family Office Association to:

Family Office Association
500 West Putnam Avenue, Suite 400
Greenwich, CT, USA 06830
It is important to include our suite number

If you acknowledged your desire to pay instead by credit card or wire transfer, we will email those instructions to you upon receipt of this application

I am a qualified purchaser:

Signature: _____ **Date:** _____

Family Office Association
www.familyofficeassociation.com / Ph: 203 570 2898

*Reminder membership into Family Office Association is limited to single family offices and individuals and families of wealth
Membership in Family Office Association is subject to the approval and discretion of Family Office Association*



For more information on membership contact:

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Family Office Association
www.familyofficeassociation.com

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