

*Unprecedented growth
and complex needs call
for elevating your
organization*

38% GROWTH IN LAST 2 YEARS
OF NUMBER OF FAMILY OFFICES
WORLDWIDE¹

BUSINESS COMPLEXITY DRIVEN BY



Global volatility in the financial markets



Emergence of next-generation family members with more contemporary requirements



Proliferation of investment options

Dynamic industry forces require family offices to evolve their culture and create an adaptive operating environment so they fulfill their mission for generations to come.

A fragmented community, combined with a lack of industry standards, make it challenging for leaders to find a trusted partner to help.

FORGE COMMUNITY

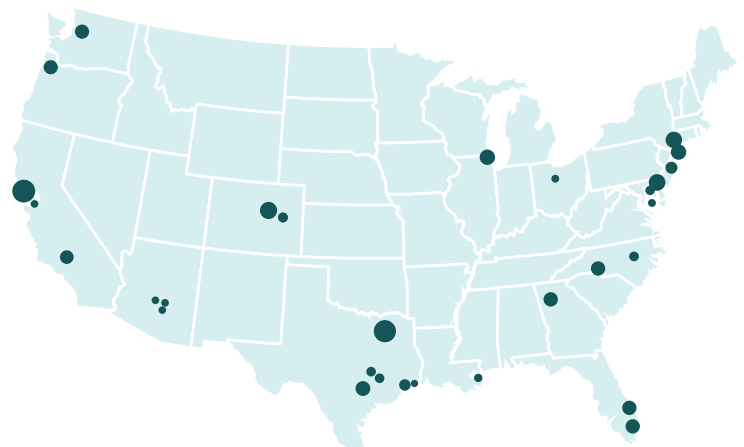
dedicated to solving problems big and small

As a self-governing, peer-to-peer community, Forge provides access to community, essential education, and governance.

COMMUNITY

*The largest single family office community
in North America*

The depth and breadth of the Forge Community is unprecedented. We offer access to a diverse and comprehensive network for members to learn from each other and share best practices so they can fulfill their mission.



43 SINGLE FAMILY OFFICE GROUPS

1,245 FAMILY OFFICES REPRESENTED

with as little as 2 employees to more than 200

FORGE COMMUNITY PLATFORM

an exclusive, secure, private digital collaboration space

Our invitation-only, private online community has one purpose: to seamlessly connect family office leaders and groups across the country in a secure and non-commercial environment so that they can learn and grow.

RUN your family office group using Forge Community platform

COLLABORATE with peers across the country

Safely and confidentially **SEEK** support from your community on your most complex needs

ACCESS relevant insights on topics important to you

ESSENTIAL EDUCATION

Insight and education focused on your most important needs

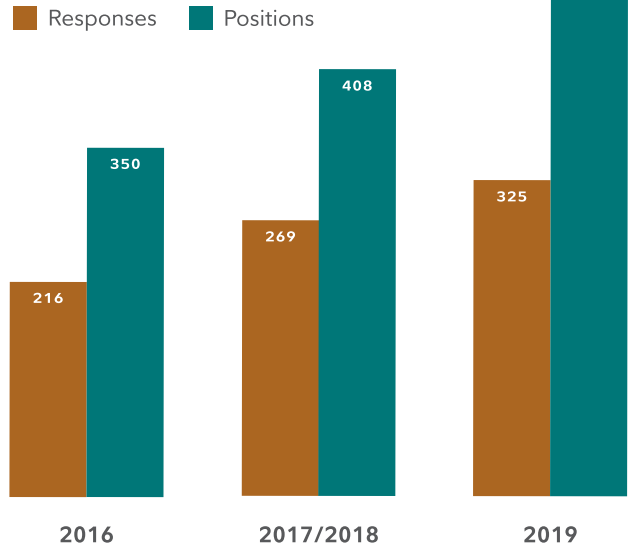
Access the highest caliber insights and education on topics most relevant for the evolution of growth of your organization

30%

OF SALARY INCREASES REPORTED IN 2019 STUDY

were as a result of data provided from our previous 2 groundbreaking studies on compensation.

FORGE BENCHMARKING STUDY RESPONSE RATES



GOVERNANCE

Access the highest caliber insights and education on topics most relevant for the evolution of growth of your organization

1 GOVERNED BY YOUR PEERS

2 COMMITTED TO ELEVATING YOUR ORGANIZATION

3 FOCUSED ON YOUR BEST INTERESTS

FAMILY OFFICE LEADERS ARE THE FORGE COMMUNITY

We have more than six self-governed committees that meet multiple times each year to drive what we do and how we do it

THOUGHT-LEADERSHIP

BENCHMARKING

STRATEGY

EVENTS

GOVERNANCE

TECHNOLOGY

OUR COMMUNITY PROMISE

Backed by the power of Fidelity Labs

The Forge Community is backed by and empowered by Fidelity Labs. With the support of Fidelity Labs, which is focused on building new Fintech businesses to better serve customers and enter new markets, Forge will continue to be a family office industry leader and innovator.

Industry standards that solve important problems

Unbiased best practices for your unique needs

ALWAYS
COMMERCIAL
FREE

COLLABORATION,
NOT COMPETITION

A MISSION FOCUSED ON YOU

MISSION

Forge enduring connections for the success of today's generation and tomorrows.

VISION

Unify the family office industry.

VALUES

1

EXCELLENCE
not perfection

2

TRUTH
not bias

3

ESSENTIAL
not overwhelming

4

ADVOCACY
not activism

5

EXCHANGE
not one-sided

FORGE COMMUNITY:
where family offices belong

FORGECOMMUNITY.COM