

Family Office Forum, London **3 – 4 October 2017, The Dorchester**

Ballroom, The Dorchester: [Presentations and panel discussions](#)
Adjoining Gold Room: [All day networking with refreshments](#)
Adjoining Crystal Suite: [CIO roundtables – see separate sheet](#)

First Day, morning of October 3rd 2017

08:00 Crush Hall (access via hotel main entrance): [Registration and reception with breakfast](#)
08:50 [Family Office Forum opening address by the organisers Katja Mülheim and Tobias Prestel](#)

Successful Family Governance

09:00 **Family Governance: Strategy and Leadership Development**

Amidst a volatile sea of complexity, uncertainty and ambiguity, finding a beacon for relevance

- For the Pioneers: the ones who quest beyond convention
- The seekers of new value and progress
- The leaders who light the way for others to follow
- For those who do not settle

[Dr. Jason Fox, Author \(Australia\)](#)

09:30 **Corporate Governance compared to Family Governance, and where they differ**

- Behavioural Risks as major component
- Decision making with family dynamics involved
- Learnings for your succession planning

[Dominik von Eynern, Family member \(UK\)](#)

10:00 **The emotional side of Money and Wealth**

- Individuals within families becoming contributing leaders
- Operating in a safe space with each other
- Developing a governance model which holds the individual, the relationships with each other
- Setting guiding principles by the family for the family

[Francesco Lombardo FEA, Managing Director, Veritage Family Office \(Canada\)](#)

10:30 [Networking and Refreshments - Meet other Family Offices, Principals and experts](#)

11:30 **Succession Planning – Different Strategies to map out your Future**

- Ground rules for succession planning
- The pros and cons of appointing a family member vs. a suitably qualified outsider
- The differentiation between management and ownership succession
- How to successfully distribute power in multifamily constellations

[Håkan Hillerström, Founder, Family Business Advisory \(Switzerland\)](#)

12:00 **Next Generation as Human Capital:** The next generation sharing a mission - leveraging the talents of each family member, with the goal of the long-term preservation of the family's wealth over multiple generations.

- How to communicate effectively
- resolve conflict
- align around a common purpose and
- create a shared family legacy

[Simon Hodges, Partner, Oxford Place \(UK\)](#)

12:30 [Lunch and networking in the Ballroom Foyer - Meet other Family Offices, Principals and experts](#)

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First Day, afternoon of October 3rd 2017, Ballroom:

Combining Profit with Purpose – Investing with Impact and Philanthropy

13:40 Keynote: Clarity between Impact Investments and Traditional Philanthropy

- Limits of impact investment
- Donor Advised Funds
- Real needs for philanthropy
- Greenwashing and deepening Green Finance

Dr. Hazel Henderson, Fellow of the Royal Society for Arts, Author, Economist (USA)

14:10 Maximising the Impact of Philanthropic Investment - Peace Parks Foundation as a Case Study

- Background of Peace Parks Foundation including the involvement of Nelson Mandela, the Rupert Family and Prince Bernhard of the Netherlands
- Matching interests and resources with needs and achievable goals
- Measurement and metrics to analyse success against pre-agreed goals, to refine future efforts
- Harnessing the power of private and public partners to increase the scale and scope of a Foundation

Dr. Jamie McCallum, Director, Peace Parks Foundation (UK)

14:40 Improving the Life of People below the Poverty Line – Impact Investing “How to”

- Take home experiences from the impact finance sector
- Helpful findings from extensive research
- Practical tips on due diligence on the many SME impact investment opportunities
- Applying Venture Capital know how in Impact Investing

Eva Yazhari, Co-Founder and CEO, Beyond Capital (non for profit fund, USA)

15:10 Networking and Refreshments - Meet other Family Offices, Principals and experts

16:10 Panel discussion: Best Practice in dealing with Impact Investments

- An overview on the Impact Investing Market, including trends and data from current research
- What impact investing really means and where does it fit within the family ecosystem
- Motivations and Strategies of Wealth Owners
- Avoiding the Traps: Key Lessons Learned – and how to find good deals / Impact Investment deal flow

Tessa Tennant, SRI adviser to Oxford University's Endowment Fund (UK)

Dr. Julia Balandina Jaquier, JBJ Consult; adjunct Professor, St. Gallen University (Switzerland)

Eva Yazhari, Co-Founder and CEO, Beyond Capital (non for profit fund, USA)

Ingo Weber, GIIN (Germany)

Moderator: Peter Brock, Executive Director, Leader Family Office Services, Ernst & Young (Germany)

16:40 Climate change and biodiversity - Why we need to understand this relationship

- The incredibly underestimated and important role of plankton for the future of life on our planet
- A basic research project to guide future action

Astrid von Soosten, The European Molecular Biology Laboratory, the non for profit life science molecular biology research institution supported by 28 states

17:00 Profitably stop Climate Change – Investing in the Green Industrial Revolution

- How Impact Investing changes from something exotic, to standard for the finance world
- How Private Equity and Impact Investing can stop climate change

Jochen Wermuth, 100% Impact Family Office Network; CIO, Wermuth Asset Management (Germany)

17:30 A Magic Hello, performed Live by

Dynamo: The Magician Impossible

18:00 Cocktail reception opened by Lady Jane Grosvenor

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Second Day, October 4th 2017, Ballroom:

09:00 Crush hall (access via hotel main entrance): **Registration and Reception with breakfast refreshments**

09:50 **Family Office Forum welcome address by the organisers Katja Mülheim and Tobias Prestel**

Family / Family Office Governance and Security

10:00 **Managing International Cross-Border Deals, Operations & Crises**

- Reflections of a seasoned “Legal Concierge” to high net worth and private organisations, on:
- Yachting as an example for personal cross border activities
- mergers and acquisition on a global business scale
- international arbitration / litigation in both private and professional life

Anton Micallef LL.D., Ph.D. (UK - Malta)

10:30 **Family Security - How to Avoid Common Pitfalls**

Family security insights in relation to:

Assets, family matters, infrastructure, physical protection, or due diligence on individuals and companies.

Tessy of Luxembourg and Nassau, Director, DS-48 (Luxembourg)

Jamie Lowther Pinkerton, Former Principal Private Secretary to the British Royal Family, DS-48 (UK)

11:00 **Networking and Refreshments** - Meet other Family Offices, Principals and experts

12:00 **The Vulnerability of Family Offices**

Family Offices are based on trust. For most Family Offices anonymity and confidentiality are paramount, but sometimes, revealing the sources of wealth and sources of tension are part of navigating financial topics and mitigating family issues. Yet they can empower unscrupulous or incompetent third parties to undermine financial and social status plus safety. How to manage.

Yousef Al-Majali, Chief Operating Officer, Director, Oculus Financial Intelligence (UK)

Rupert Boswall, Chairman/Senior Partner, RPC (UK)

Family Topics

12:30 **Art and Commerce - "A Single Winged Bird Can't Fly"**

- Transiting from Business to Art
- Art narrative
- An outsider view of the Art market

Philipp Humm, Artist; formerly CEO Vodaphone Europe, CEO T Mobile USA (UK)

13:00 **Private Family Office Forum lunch at China Tang** - Meet other Family Offices, Principals and experts

14:30 **“Collectibles” – Passion or Investment – How to have your cake and eat it?**

CIO, Single Family Office

15:00 **How to avoid or treat Self-Destructive Behavioural Patterns exhibited by Teens and Young Adults**

- A look into mood or eating disorder, depression, fear of failure, drug-, game-, sex- or gambling-addiction, ADHD, ADD or ODD
- Regaining self-respect and setting new goals, which will lead to positive choices in ones live
- Dealing with addiction and mental health care behavioural disorders / problems

Piet Jansen, Director, Yes We Can Youth Clinics (Netherlands)

15:30 **A Family Legacy**

Principal, SFO (UK)

16:00 **Chairman’s remarks and end of the Family Office Forum, London 2017**

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CIO roundtables in the Crystal Suite

Venture Capital

Views and Insights from an Investor's Perspective – The Options and Best Practise

[Viktoriya Tigipko](#) (SFO Ukraine) and [Thomas Villinger](#) (SFO Germany)

Start-Ups

What to watch out for and how to invest in them

[Dr. Hermann Hauser, CBE](#) (SFO Austria)

How to co-invest

as a large Family Investor, with other large Investor Families

[Eli & Jeremy Bronfman](#) (SFO USA / Israel / UK)

Investing in Life Science

Experiences shared

[Janus Kamradt, Bosarge Family Office](#) (SFO USA)

Real Estate as an Asset Class for Family Offices

Direct and / or Indirect Investments

[Max Aengevelt](#) (SFO UK)

Real Estate Financing

The Different Ways to Operate, and their Respective Advantages

[Wesley Ranger, Director, Brunswick International Finance](#) (UK)