Join us when 100+ Principals, Family Offices, CIOs and Experts meet!

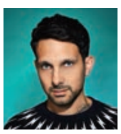
Lady Jane Grosvenor

Tessy de Luxembourg and Nassau

Dr. Hazel Henderson
Economist (SFO, USA)

Viktoriya Tigipko
(SFO Ukraine)

Eva Yazhari
(SFO, N.Y.C.)



Dynamo
Magician Impossible

Dr Jason Fox
Author (Australia)

Simon Hodges
Oxford Place (UK)

Thomas Villinger
(SFO Germany)

Prestel & Partner

# Family Office Forum

## London, 3 - 4 October 2017, The Dorchester



### Where 100+ genuine* Family Offices and Principals meet

**Case Studies, Key Notes, Panel Discussions and Networking:**

Learn from other Family Offices and select experts

Improve the operational side of your Family Office

Understand how others invest; sustainably, ethically, responsibly and for true impact

Master the essentials such as Family Governance best practice

Connect with Peers



**Free Entry**
for genuine
Family Offices

*Our definition of a Family Office is minimum £100M in assets and serving one or a few families (not a solution provider to many 3rd parties). Those doing both equally (being investor plus provider) are welcome to join us at a 50% fee.

Partners

Price Bailey Wealth Solutions · The Royal Mint – Established for Tomorrow™ · frank hirth · OCORIAN · The Oxford Ski Company · Rathbones – Look forward · BULLION · EMBL · yes we can Youth Clinics – Addiction & Mental Healthcare · Standard & Poor's MMD Money Market Directories · Brunswick International Finance – Specialist Lending · Oculus Financial Intelligence

**Join us!** Register **online** at www.prestelandpartner.com by **email** office@prestelandpartner.com or **phone** +44 (0) 20 339 7139 0

Prestel & Partner

# Family Office Forum

## London, 3-4 October 2017, The Dorchester

> My total respect for the fact that you bring together the actual, genuine experts in Germany....
>
> UHNWI

> I am very impressed with the agenda. These are indeed my practical issues dealt with....
>
> MD, Single Family Office

> Looking forward to meeting new people and learning about new tools and solutions....
>
> CIO, Single Family Office

**The Family Office Forum London deals exclusively with specific topics for UHNWI and Family Offices, with a focus on Family Governance, Family Office Operations, and how to do good things with your money (sustainable, ethical, responsible and impact investments).**

“Hands down the best FO event ever!” Steffi Claiden, Family Office Review

“Ratio of Investors / Providers was very good.” Philipp von Königsmarck, Fidelity

“By far the finest family office conference I have ever attended” Ozi Amanat, SFO

“The large number of principals was especially impressive.” Heiner Weber, SFO

“Great success! Interesting and a rewarding exchange.” Stephan Gerwert, Rigi Family Office

“Made excellent new contacts which I will follow-up on.” Michael Hamke, SFO

“Surpassed all my expectations! Excellent networking opportunities.” Ida Beerhalter, MFO

### What makes us different?

**The audience:** Our event is for Single Family Offices, Principals and Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or solutions to third parties are considered to be solution providers.

**The concept:** More Family Officers than solution providers on stage. More Family Officers than solution providers in the audience. Network with 100+ UK-based Family Offices.

**The content:** Family Governance, Next Gen, Assets, Operations, Security, Philanthropy and Impact.

### **The Family Office Forum** in London, 3-4 October 2017 is based on:

**1.**Help from UHNWI and months of research with Single and Multi Family Offices, private banks, banks with UHNWI management, academics and their partners.

**2.**The precise wishes and the active support of Family Offices. The agenda is based on the requirements and challenges of Family Offices in their day-to-day lives.

**3.**The long-standing expertise of the partners at Prestel & Partner, particularly with Family Offices. The genuine interests of Family Offices are at the core of our Forum. Please refer to our testimonials at **www.prestelandpartner.com**

The Family Office Forum takes a closer look. Topics are dealt with in depth to enable our participants to experience genuine progress in their work.

The Family Office Forum offers all participants a platform to exchange experiences, hear about the latest strategies and discuss them afterwards. It is the ideal environment to nurture important relationships and to meet new interesting contacts.

No product presentations or specific pitches - topics covered are key issues for Principals and Family Offices, such as Family Governance and Operations. These hands-on topics have clear advantages for all participants. The clear focus on added value, trends and strategies means that everyone stands to gain.

**Are you a Principal or Family Office? We are delighted to welcome you and offer you privileged free admission! Simply contact:** office@prestelandpartner.com
**Are you a genuine partner of, or solution provider to Principals or Family Offices?Simply contact:** ticket@prestelandpartner.com

www.prestelandpartner.com





Prestel & Partner

# Family Office Forum

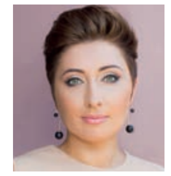
## London, 3-4 October 2017, The Dorchester

## On stage: 28 Family Offices and experts share their knowledge - among them are:

Lady Jane Grosvenor

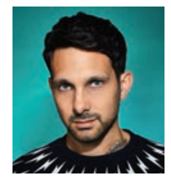
Tessy de Luxembourg and Nassau

Dr. Hazel Henderson
Fellow, RSA, Economist USA



Viktoriya Tigipko
(SFO Ukraine)

Eva Yazhari
Beyond Capital



Dynamo - Magician Impossible

Dr Jason Fox
Author (Australia)

Simon Hodges
Oxford Place

Thomas Villinger
(SFO Germany)

Francesco Lombardo

Wesley Ranger

Peter Brock

# 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 pages 8-9

## First Day - Morning of October 3rd 2017

08:00 Crush Hall (access via main entrance): **Registration and Reception with breakfast**

08:50 **Family Office Forum opening address by the organisers Katja Mülheim and Tobias Prestel**

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)**

## Family Governance – The Human Aspects and Drivers Behind It

09:30 **Efficient Family-Business Governance - The Behavioural Angle**
- Behavioural Risk Manifestation in Business Families: Agency Risk
- Contrasting Governance Regimes: Non-Family Business vs. Family Business
- Combining Family and Business Governance

**Dominik von Eynern, Family member (UK)**

09:50 **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)**

10:20 **Heading Family Disputes – what to do when it happens**
- Case study of a family dispute
- Creating a resolution path
- How to gain buy in from all family members

**Paul Pybus,** Partner, Head of Fiduciary, **Price Bailey**

10:50 Networking and Refreshments - **Meet other Family Offices, Principals and experts**

## Next Generation / Succession Planning - Best Practice

11:40 **Successful wealth transition to the next generation is the hardest task facing any wealthy family… How ready are you?**
- Why 70% of families fail to transition their wealth to the second generation; exploring the main landmines and how to mitigate them:
- Financial Capital vs. Human Capital - preparing the money for the children vs. preparing the children for the money
- Black Hole vs. Black Box – why families typically lose control in a transition
- Risk Management – across family relationships, family wealth and family business
- No Transition Structures – Trusts, Family Office, Family Board"

**Simon Hodges, Partner, Oxford Place (UK)**

12:10 **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)**

12:30 Lunch and networking in the Ballroom Foyer - **Meet other Family Offices, Principals and experts**



Family Office Forum

London, 3-4 October 2017, The Dorchester

Conference Programme Day 1

**Ballroom, The Dorchester:** Presentations and panel discussions

**Adjoining Gold Room:** All day networking with refreshments

**Adjoining Crystal Suite:** CIO roundtables – see pages 8-9

## First Day - Afternoon of October 3rd 2017, Ballroom:

## Combining Profit with Purpose – Philanthropy

13:40 **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)**

14:00 **Give and Gain Purpose and Personal Fulfilment**
Reasons to give
**Lady Jane Grosvenor**
**Dorinda Wolfe Murray,** Trustee, **First Light Trust**

14:20 **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 **Creating the underlying Conditions where Impact Investing and Private Equity can flourish, through Philanthropy**
**Tessa Tennant,** SFO and SRI adviser to Oxford University's Endowment Fund (SFO, UK)

15:00 **Philanthropy - How to: What makes a successful philanthropic project?**
Discussing two main factors in creating a successful outcome in the charity sector: Engagement and Rigour
**Lady Jane Grosvenor**
**Grant Gordon,** Philanthropist & Social Entrepreneur, **William Grant & Sons**
**Dorinda Wolfe Murray,** Trustee, **First Light Trust**
**Andrew Mitchell,** Founder, **Global Canopy**
**Moderator: Richard Joynt,** Executive Director, **Ocorian**

15:40 Networking and Refreshments - **Meet other Family Offices, Principals and experts**

## Combining Profit with Purpose – Impact Investments

16:30 **Impact Investing "How to" - Improving the Life of People below the Poverty Line**
- 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 (not-for-profit impact fund, USA and Switzerland)**

17:00 **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 (not-for-profit impact fund, USA and Switzerland)**
**Ingo Weber, GIIN (Germany)**
**Moderator: Peter Brock, Executive Director, Leader Family Office Services, Ernst & Young (Germany)**

17:40 **A Magic Hello, performed Live by**
**Dynamo: The Magician Impossible**

18:00 **Cocktail reception opened by Lady Jane Grosvenor** prestel & partner

# 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 pages 8-9

## Second Day - Morning of October 4th 2017, Ballroom:

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

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

### Family / Family Office – Planning for 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 Next Generation / Succession Planning - Best Practice

12:30 **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)**

13:00 **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)**

13:30 Private Family Office Forum **lunch at China Tang** - **Meet other Family Offices, Principals and experts**





# Family Office Forum

London, 3-4 October 2017, The Dorchester

prestel & partner

**Ballroom, The Dorchester:** Presentations and panel discussions

**Adjoining Gold Room:** All day networking with refreshments

**Adjoining Crystal Suite:** CIO roundtables – see pages 8-9

## Second Day - Afternoon of October 4th 2017, Ballroom:

### Combining Profit with Purpose – Climate Change as an Opportunity

15:00 **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)**

15:30 **Climate change and biodiversity - Why we need to understand this relationship**
- Case study: The important role of plankton for the future of life on our planet
- A basic research project to guide future action

**Astrid van Soosten, The European Molecular Biology Laboratory, Europe's premier not-for-profit life science research institution supported by 23 member states**

16:00 Networking and Refreshments - **Meet other Family Offices, Principals and experts**

### "It´s Personal"- Inside Perspectives

16:45 **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
- Dealing with addiction and mental health care behavioural disorders / problems
- Regaining self-respect and setting new goals, which will lead to positive choices in ones live

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

17:15 **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)**

17:45 **"Collectibles" – Passion or Investment – How to have your cake and eat it?**
**CIO, Single Family Office**

18:15 **Chairman´s remarks and end of the Family Office Forum, London 2017**

## First Day - October 3rd 2017

# CIO roundtables in the Crystal Suite

**09:30** Venture Capital

Views and Insights from an Investor´s Perspective – The Options and Best Practice

**Viktoriya Tigipko** (SFO Ukraine) and **Thomas Villinger** (SFO Germany)

**11:30** How to Co-Invest

as a large Family Investor, with other large Investor Families

**Eli & Jeremy Bronfman** (SFO USA / Israel / UK)

**14:00** Investing in Life Science

Experiences shared

**Janus Kamradt, Bosarge Family Office** (SFO USA)

**16:30** The Evolution of Precious Metals as an investment

**Fiona Hughes, The Royal Mint** (UK)





## Second Day - October 4th 2017

# CIO roundtables in the Crystal Suite

**12:00** Offshore investment management - How to make the management of complex wealth simpler: A Discussion

**Ian Dembinski,** Head, **Rathbone Private Office** (UK)

**12:45** The US and it´s many opportunities for the international family, with a wealth of investment, professional and social opportunities

Whether a family member is considering periods of presence in the US, already has a permanent connection or considering inward investment, careful tax planning will need to be undertaken. This discussion will focus on the following areas:

Impact of US Citizenship, Green Card Holder Status or Residency.
This will include a review of what can be done if a US Person is not tax compliant

Planning for leaving the US tax system

Structuring considerations for inward investment into the US (business assets, investment assets, real estate etc). What is the intended plan for the US?

The sometimes forgotten issues of State level taxation.

Frank Hirth Plc are delighted to lead the discussion and we would welcome everyone’s input in terms of sharing experiences and the practical issues of being US connected.

**Iain Younger,** board of directors, **Frank Hirth plc** (UK - USA)

**15:00** Real Estate as an Asset Class for Family Offices

Direct and / or Indirect Investments

**Max Aengevelt** (SFO UK)

**17:00** Real Estate Financing

The Different Ways to Operate, and their Respective Advantages

**Wesley Ranger,** Director, **Brunswick International Finance** (UK)

# Family Office Forum

London, 3-4 October 2017, The Dorchester

### Background of Participants

More Family Offices on stage than service providers. More Family Offices in the audience than service providers. For further information on the composition of our audience please see: www.prestelandpartner.com

The high quality and relevance of our delegates is ensured because of
1. Our in-depth research and individual contacts
2. The personal and individual invitations to the Family Office Forum

Free participation is exclusive to Family Offices. Only genuinely relevant partners of Family Offices will be able to purchase a delegate pass. In addition the number of delegate passes is strictly limited. This ensures that the participating Family Offices enjoy a meeting among peers.

*Our definition of a Family Office; minimum £100M in assets and serves one or a few families (not a solution provider to 3rd parties). Those doing both (family investor and solution provider to FOs) are welcome to join us at 50% of the standard fee.

### Who is a Partner

Partners are experts in their respective fields and work with or for Single and Multi Family Offices. The Family Office Forum is not a sales show: partners do not present financial products but assist Family Office with optimization.
**If you want to become a sponsor please contact office@prestelandpartner.com**

## Partners

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Ocorian · The Oxford Ski Company · Rathbones – Look forward · Bullion

EMBL · yes we can Youth Clinics – Addiction & Mental Healthcare · Standard & Poor's MMD Money Market Directories · Brunswick International Finance – Specialist Lending · Oculus Financial Intelligence





# Family Office Forum

## Register Now

### London, 3-4 October 2017

100+ England based Family Offices and UHNWI are expected - as per our unique definition below.

### Zurich, 14-15 November 2017

160+ International Family Offices and UHNWI from all over the globe are expected to join in November.

### Singapore, 5-6 December 2017

100+ Asia based Family Offices and UHNWI are expected, as per our unique definition below.

### Dubai, 6-7 February 2018

The MENA region Family Office Forum for 100+ Principals and genuine Family Offices with a clear minority of service providers.

### Wiesbaden, 17-18 April 2018

Join us when 200+ genuine* German speaking Family Offices meet.

**Are you a Principal or Family Office? We are delighted to welcome you (while assuring you full privacy) and offer you privileged free admission! Simply contact office@prestelandpartner.com**

**Are you a genuine partner of, or solution provider to Principals or Family Offices? Simply contact ticket@prestelandpartner.com**

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### Your Registration:

**Online at:** www.prestelandpartner.com under tab "Become a Delegate" or send an email to: office@prestelandpartner.com
**By phone:** Please dial +44(0) 20 339 71390

# Family Office Forum

## London, 3-4 October 2017, The Dorchester

Registration

## Reserve your place at the Family Office Forum London

3-4 October 2017, The Dorchester

## Register Now

Are you a Principal or Family Office? We are delighted to welcome you and offer you privileged free admission!
Simply contact: **office@prestelandpartner.com**

| | Until 31 January 2017 | Until 31 March 2017 | Until 31 May 2017 | From 1 June 2017 | Number |
|---|---|---|---|---|---|
| **Both Days:**<br>3rd and 4th of October 2017 | £2490 + VAT<br>Save £600 | £2690 + VAT<br>Save £400 | £2890 + VAT<br>Save £200 | £3090 + VAT | |
| **One Day Only:**<br>3rd or 4th of October 2017 | £1990 + VAT<br>Save £600 | £2190 + VAT<br>Save £400 | £2390 + VAT<br>Save £200 | £2590 + VAT | |
| | | | | Total | |

Registration fee includes refreshments, coffee breaks, snacks, buffet lunch, drinks and conference documentation. Accommodation is not included. VAT subject to government change.

## Free Admission for Family Offices

**Are you a genuine* Family Office? You have the privilege of free admission.**
**Please contact tobias.prestel@prestelandpartner.com**

### Your contact details

**Delegate name:** ______________________

**Title:** ______________________

**Company:** ______________________

**Address:** ______________________

**Country:** ______________________

**Telephone:** ______________________

**Email:** ______________________

**Permission granted by (name and signature):** ______________________

### How to register

**In writing:** Post us this form, or fax it to +44 (0) 20 3397139 1

**Online:** www.prestelandpartner.com in the section "Become a Delegate" or email office@prestelandpartner.com

**By phone:** +44 (0) 20 339 7139 0

### Payment Details

**Bank transfer:** Prestel and Partner Ltd
Account: 46223368, Sort code 30-99-93,
BIC LOYD GB21132,
IBAN GB43 LOYD 3099 9346 2233 68,
Lloyds TSB Bank

Payments due within 10 days of invoice date, and in advance of the Family Office Forum. For terms and conditions see www.prestelandpartner.com

### Privacy

☐ Tick here if you do not wish to receive information from Prestel and Partner Ltd.

### Cancellation policy

1. If you are unable to attend your place is transferable.
2. Invoiced amounts are due in full. Prestel and Partner will not issue refunds.
3. If you register but can not attend Prestel and Partner will provide you with conference documentation.
4. Prestel and Partner reserves the right to amend the conference programme and schedule without notice.
5. Prestel and Partner is not responsible for any costs occurring due to any changes or cancellations.

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