

Family Office Forum, Singapore December 5th, 2017 at The Fullerton Hotel

Ballrooms 1 and 2: [Presentations and panel discussions](#)

Foyer: [All day networking with refreshments](#)

Ballroom 3: [CIO roundtables – see last page](#)

08:00 Registration and Reception with breakfast

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

9:00 Keynote: The history of money

J Bradley Hall, Icon (Dubai and Switzerland)

Family Governance, Succession Planning & Next Generation

9:30 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)

10:00 Networking and Refreshments - Meet other Family Offices, Principals and experts

11.00 Panel Discussion: Family Office Structures to avoid Family Disputes

Best practice in dividing functions between Family and Business, family members or Family Office

- Contrasting Governance Regimes: Non-Family Business vs. Family Business
- Combining Family and Business Governance - Differentiation between management and ownership succession
- How to successfully distribute power in multifamily constellations - How to gain buy in from all family members

Jerome Duval Fleury, Principal, SFO (France)

Eva Law, Founder & Chairman, **Association of Family Offices in Asia** (Hong Kong)

Moderator: Alan Duncan, Founder, **PWN** (Australia)

11:30 Building Family Legacy through Citizenships and Residence Programs

- What is the quality of one's Nationality?
- What's driving investor migration for Asia's wealthy families?
- Key considerations for HNW families in relation to residence and citizenship planning
- Global trends and developments in investor migration

Dominic Volek, IMCM, Managing Partner, Head Southeast Asia, **Henley & Partners** (Singapore)

12.30 Global Taxation Structures as Criteria for Family Estate and Succession planning

- Tax & estate planning – a global overview
- Family, asset and business structuring – goals and challenges
- The Malta Option for international families

Kenneth Camilleri, Senior Partner, **Chetcuti Cauchi Advocates** (Malta)

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

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Investing as a Family Office (Part 1)

14:00 Keynote: Be a Future-Shaper and Re-Imagine the Boundaries of Your Business

Actively shape the future of your market space, or be left in the wake of others who are. Redraw market boundaries in a way that assures the ongoing relevance and growth of your organization.

Gabor George Burt, Author, Innovation Pioneer, Human Motivation Expert (USA)

14:30 Climate Change as Investment Opportunity

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

Dan Choon, Dyan (SFO, Luxembourg & Hong Kong)

15:00 Networking and Refreshments - Meet other Family Offices, Principals and experts

16:00 Keynote: The role of 'entrepreneurial risk' in the private investment portfolio

Often families, having realised in whole or in part, the value of their investment in a successful family enterprise, seek to invest in new entrepreneurial endeavours.

- How important is "entrepreneurial risk" as an investment category?
- Asset allocation strategy vs opportunistic investing
- In-sourcing vs outsourcing and managing your involvement in business
- Family members as venture capitalists: Managing relationship risks

David Werdiger, Author, strategic advisor, and technology entrepreneur (Australia)

16:30 Joint Ventures, Co-Investments and working with other Families: Close Encounters of the Third Kind

It is not easy to establish a JV generally speaking and even less so when partners are family shareholders. This is because (a) family businesses have strong values and (b) JVs are not about taking control over the other or melting one into another, but about combining cultures into one third object, which then develops its own culture. Not easy for families to accept. But when it works, it can be very powerful. JVs between families require mind openness, respect and trust.

Grégoire Amigues, Partner, **JAB Investments** (Family owned global holding of groups such as **Coty** or **RB**)

17:00 Panel discussion: Private Equity as Family Office Investment

- Going direct, or indirect through funds?
- Deal sourcing - family and friends, or professionals?
- Geography – local where you know, or global opportunities?
- Lessons learnt and Best Practice forwardlooking

Grégoire Amigues, Partner, **JAB Investments** (Family owned global holding of groups such as **Coty** or **RB**)

Moderator: Conrad Tsang, Founder and Chairman, **Strategic Year Holdings Limited**

17.50 Drinks reception at the Post Bar in The Fullerton - Meet other Family Offices, Principals and experts

Family Office Forum, Singapore

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Foyer: [All day networking with refreshments](#)

Ballroom 3: [CIO roundtables – see last page](#)

08:30 Registration and Reception with breakfast refreshments

09:30 Family Office Forum welcome address by the organisers Katja Mülheim and Tobias Prestel

09:40 **Morning Keynote: From Compliance to Advantage - Mapping the Global Transition for Investors**
Dr. Hazel Henderson, Author, Economist (USA)

Family Office Strategy

10:00 Experiences shared: Doing good while making money – Best Practice in ESG, Impact & Co

- An overview on the Impact Investing Market, including trends and data from current research - and personal judgements
- What impact investing really means; Myths, Real Talk and Real Returns
- Motivations and Strategies of Wealth Owners
- Avoiding the Traps: Key Lessons Learned – and how to find good deals, Impact Investment deal flow

Jérôme David, CIO, SFO (Singapore)

Hong Suong Nguyen, **Starise Investments** (Vietnam)

David Galipeau, Chief Impact Officer, **United Nations SDG Impact Finance** (Thailand)

Moderator: Robert Rubinstein, Chairman, **TBLI** (Netherlands)

10:30 The European family office approach – a good fit for Asia?

- Advantages of servicing wealthy families with a comprehensive and independent approach
- Range of services that can also appeal to Asian families
- Experiences from the viewpoint of a European family office
- Implementation of such an approach in Asia

Oliver Muggli, Partner, **Mandorit** (Luxembourg & Hong Kong)

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

“It’s Personal”- Inside Perspectives

11:50 The Vulnerability of Family Offices

Family Offices are based on trust. Sometimes, revealing information wealth is source of tension and empowers 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)

12:20 Panel Discussion: Education – both aspects: for you as parent, and for you as an Investor

- Global Education Trends and Opportunities
- Developing the Schools of Tomorrow
- Investing in Education and our Families
- The future of education in the 21st Century

Johannes Nagel, MD, **Academedia** private education provider (Germany)

Sebastian Barnard, **GEMS World Academy** (Singapore)

Moderation: Richard Henry, Head of School, **GEMS World Academy** (Singapore)

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14.00 **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
- Dealing with addiction and mental health care behavioural disorders / problems

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

Investing as a Family Office (Part 2)

14:40 **Transforming Agriculture & Food technologies into sustainable and robust solutions**

- What Investors can learn from Israel, the start-up nation
- Advantages of the Israeli Ag & Food investment eco-system
- Translating science into business - The challenges of getting from ideas to products
- Copia's model as a SFO backed entity and it's impact

Ohad Zuckerman, **Copia Agro** (Israel)

15:20 Networking and Refreshments - Meet other Family Offices, Principals and experts

16.10 **"Real Assets" such as Agriculture, or Wine**

Why we are scared of interest rates and what we are doing about it!

The Agricultural story. (And why we own 5% of Australia's viticulture too....).

Ed Peter, Group Chairman, **Duxton Capital Pty Ltd** (Australia)

16:50 **Panel discussion: Real Estate as Family Office Investment**

- Global trends – data and facts
- What Going direct, or indirect through funds?
- Deal sourcing - family and friends, or professionals?
- Geography – local where you know, or global opportunities?

Moderator: David Pieper, Principal, **Optimus Prime Family Office** (Germany and Russia)

17.20 **Portfolio Construction as a Family Office**

- Ratio of Make or Buy
- Implementing ESG Impact
- Experiences shared and lessons learnt
- Asset Class Preferences

Peter Gibson, Principal, **Dynasty Family Office** (Singapore)

Ed Peter, CEO and CIO, **Duxton Capital Pty Ltd** (Australia)

Stephen Diggle, Principal, **Hrothgar SFO** (Singapore)

Dr. Thorsten Querg, Senior Partner, **FOCAM AG** (Germany)

Moderator: Peter Douglas, Director, **CAIA Foundation** (USA), Financial Planning Association FPAS (Singapore)

17:50 Chairman's remarks and end of the Family Office Forum

CIO roundtables

An exchange of views, opinions and experiences held in an open format

Anonymous, no pre-registration needed: simply join and listen or speak up

Morning of first day – Investment Best Practice - Cryptocurrencies

11.00 Cryptocurrencies: What is the situation, outlook and opportunities?

Moderator: J Bradley Hall, Icon

11.45 Venture Capital: Exchange of views and experiences – lessons learnt

Moderator: Dr. Ole Mensching, Partner, TruVenturo

Afternoon of first day: Governance

16.00 Governance: Developing Women in Leadership Positions

Moderator: Caterina Meloni

Morning of second day – Investment Best Practice – Real Estate

11.00 Real Estate: The successful ways to operate as Family Office Investor

Moderator: David Pieper, Principal, Optimus Prime Family Office