

Keynote

The Age of Uncertainty - Geopolitics as Investment Criteria

Cherie Blair CBE, QC (SFO, UK)

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

“Family- / Family Office-Governance 2030”

- Current Developments, Trends and Best Practice in Managing Family Governance
- An outlook how the Future might look like

Prof. Dr. Dr. Peter Sester, **University St. Gallen** and Advisor (SFO, Brazil)

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 (SFO UK)

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 multi-family constellations

Håkan Hillerström, Family Business Advisory (MFO Switzerland)

Next Generation as Human Capital: Sharing a mission and leveraging talents for the long view

- Communicate effectively
- Resolve conflict
- Align around a common purpose and
- Create a shared family legacy

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

Doing good while making money – Investing with Impact and Philanthropy

Impact Investing and Environmental, Social and Corporate Governance (ESG) - How the current financial system undermines sustainability and how it can be aligned with a Triple Bottom Line
Robert Rubinstein, Chairman, **TBLI** (Netherlands)

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** (SFO and not for profit fund, USA)

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

Dr. Julia Balandina Jaquier, CFA, **JB CONSULT**; adjunct Professor, **St. Gallen University** (Switzerland)

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

Ingo Weber, **GIIN** (SFO, Germany)

Antonis Schwarz, 3rd Generation Family member; Manager, **The ImPact** (SFO, Greece)

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

Doing the groundwork to solve one of the big challenges of mankind – Climate Change

- Understanding the complexities and preserving the variety of life on our planet
- A project to better understand what action to take

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

Solar Energy as a profitable Impact Investment Solution to combat Climate Change

Maurizio Totta, Entrepreneur & Investor (SFO, Europe)

Creating the underlying Conditions where Impact Investing and Private Equity can flourish, through Philanthropy

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

Family Topics

Education in Poor Countries - Investments and Donations as a Family Office topic – “How to”
Julia Gillard, Chair, **Global Partnership for Education**; **Prime Minister, Australia** (SFO, Australia)

Art and Commerce - "a single winged bird can't fly"

- The transition from Business to Art
- My message as an artist
- Early impressions and criticism of lack of professionalism and transparency within the art market

Philipp Humm, Artist; formerly CEO **Vodafone** Europe, CEO **T Mobile** USA (SFO, UK)

Empowering a Billion Women By 2020

Ingrid Vanderveldt, Entrepreneur-in-Residence for **Dell Inc.**, founder, **Dell Innovators Credit Fund**, **Dell Founders Club**, and **The Billionaire Girls Club** (SFO, USA)

Health is the New wealth - A panel discussion on Holistic Wellbeing

C. Curtis, Psychologist (UK)

Piet Jansen, Director, **Yes we can Youth Clinic** (Netherlands)

Moderation: Katja Mülheim (SFO, UK)

The Desire for Legacy – A refreshing look at Cemeteries and their reflection on Legacy

Michael von Stumm, Senior Advisor to Kurt A. Engelhorn (SFO, Europe)

Family Security - How to Avoid Common Pitfalls

Family security insights in: assets, family matters, infrastructure, physical protection, or due diligence on individuals and companies.

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

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

The Vulnerability of Family Offices

Managing the gap of Family Offices' need for trust, anonymity and confidentiality on one side, and exposure while navigating financial topics and mitigating family issues on the other side.

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

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

How to Avoid, or Treat, Self-Destructive Behavioral Patterns in 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 life
- Dealing with addiction and mental health care behavioural disorders / problems

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

Managing international cross-border Deals, Operations & Crises: Reflections of a seasoned “Legal Concierge” to high net worth and private organisations, on the topics of

- Yachting as an example for cross border activities and the mix of personal & business
- Mergers and Acquisition on a global scale
- International arbitration / litigation in both private and professional life

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

Investments

How our Family Co-Invests with other large Investor Families – Experiences shared and Opinions on Best Practice

Eli & Jeremy Bronfman (SFO New York City / London)

Venture Capital - Insights from the Investor's perspective on options and best practice

Viktoriya Tigipko (SFO Ukraine) and **Thomas Villinger**, CEO, CIO, **ZHF** (SFO Germany/Global)

Start-Ups – How to invest in them

Dr. Hermann Hauser, CBE (SFO Austria)

Real Estate as an Asset Class for Family Offices – Direct and Indirect Investments

Max Aengevelt (SFO UK)

Real Estate as a lending opportunity for the Family Office – an SFO's case study

Sasha Bernier, Senior Vice President, **Cheltenham Investment** (SFO USA)

Real Estate Financing – The different ways to operate, and their respective advantages

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

Private Equity and M&A - current global developments and global key regions

Aitua Ekhaese, Managing Partner, **North Hill Advisory Partners** (UK)

Family Co-Investments in Private Equity – Insights into a Family's Operations

Ipek Mutlu, Director, **ESAS** (SFO, Turkey)

Is there a coming Secular Bond Bear Market? Reasons why to expect a secular, multi-decade bond bear market and how equities do in that environment

Gabriel Stein, SFO advisor (UK)

Insights into one Family's Investment Strategy based on Stocks/Bonds, Real Estate, Shipping, Ventures and Education

Prof Dr Peter Lorange (SFO, Switzerland)

Volatility – Dangerous or Beneficial?

One-way street bonds and equities?

Is your portfolio afraid of volatility?

Volatility as a complementary asset class

Alternative ways of how you can profit from volatility

Stephan Beismann, COO, Partner, **QC Partners** (Germany)

Infrastructure as an Investment Theme – North American Energy as a Case Study

David Berenger, Vice President, **Tortoise Capital Advisors** (USA)

Agriculture as a proven Family link between Sustainability and Returns

Gordon Ommen, Principal, **BirdDog Capital** (SFO, USA)

Investing in Life Science – Experiences shared

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

Investments in the Tourism and Hospitality Industry – Advantages and Dangers for a Family Office
Aradhana Khowala , CEO & Founder, **Aptamind Partners** (UK)

Movies as an Asset Class

Helge Sasse, Director, **Tempest Film** (SFO, Germany)

Operations

Robo-Advisors: Threat or opportunity?

Alexander Classen, Partner, **Bedrock** (MFO, Switzerland)

Family Office Infrastructure - Results from a Study on the Status Quo

Are your Operations such as Monitoring & Reporting up to date?

Dr. Marc Herzog, Managing Director, **Frontiers Management Consulting** (Germany)

Global Geo-Strategic Developments in regards to your Asset Allocation and General Operations

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

How to Measure and Rank a Family's Investment Sustainability

Roland Schatz, Founder and CEO, **Media Tenor International AG** (Switzerland)

Make or Buy – The Advantages of Outsourcing Family Office Needs

J. Christian Stadermann, Founding partner, **Logos Patrimon** (MFO, Germany)