

# Family Office Forum London

## Post-Event Report

The annual meeting of UHNWI and Family Offices based in the UK  
15 –16 September 2015 (next London event: 4 - 5 October 2016)

### Introduction

The Family Office Forum London in October 2015 was originally planned for **100 UHNWI and Family Offices** – that number grew to an incredible **142 UHNWI** and genuine Family Offices attending! The positive feedback was overwhelming and we are grateful to have such high quality speakers and attendees. See attendee statements [here](#) .

In view of the overwhelming demand for our events, we are actively preparing Family Office Forums in 2015/2016: [International](#) Zurich November 2015, [Dubai](#) February 2016, [Germany](#), April 2016, [London](#) October 2016.

### Programme, Speakers and Audience

The forum [programme](#) was based on recommendations and several months of research. However, it is thanks to our 47 [speakers](#) - who, like the audience, were predominantly UHNWI or Family Officers - that the Family Office Forum was such a success.

Our participants included royalty, former heads of states, widely recognized specialists, and many multi-generational Family Offices and Principals. It is because of this collective wealth of knowledge and experience that the event networking was of the highest calibre and most highly treasured amongst our guests.

### Partner (Sponsors)

The support of our [partners](#) made the Family Office Forum possible and they have reported being elated with the contacts made during their participation. The very key to their success was the highly relevant topics and expertise of our carefully chosen partners.

### Organisers' Summary

We would like to thank all the family officers, family members, experts and in particular, the speakers. Many attended the Family Office Forum London 2015 to exchange information, learn about trends and solutions, hold stimulating discussions and last but not least, to network with peers.

We are looking forward to the next Family Office Forums in 2015/2016;  
Please get in touch and secure your place: We very much look forward to welcoming you there!

Yours,

[Katja Mülheim](#) and [Tobias Prestel](#)

# Attendee Structure

We are very happy with the composition of participants which was exceptionally high quality thanks to careful vetting and personal recommendations.

1. 142 UHNWI and Family Offices attended the Family Office Forum
2. The number of UHNWI and Family Offices was significantly higher than the number of Solution Providers (a ratio of about 2:1!)
3. Excellent level of active participation, in lively debates and networking opportunities

## 221 attendees in total

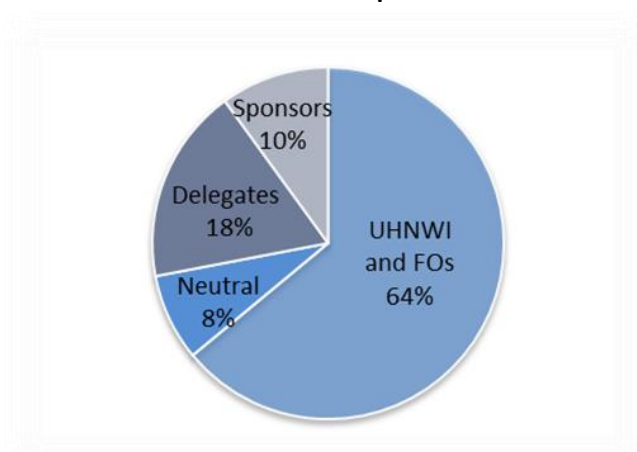
(Tuesday 181, Wednesday 158 attendees; average median number was 150 at any given time)

			<i>Assets under Management</i>
<b>142 Family Officers und UHNWI</b>	<b>64 %</b>		
✓ 43 UHNWI		19.5 %	> 35 bn *
✓ 56 Single Family Officers		25 %	> 60 bn *
✓ 43 Multi-Family Officers		19.5 %	> <u>36 bn</u> *
			> 131 bn *
<b>18 Neutrals</b>	<b>8 %</b>		
✓ 05 Neutral Academics		2 %	
✓ 05 Neutral Experts		2 %	
✓ 08 Neutral Guests		4 %	
<b>40 Delegates (35 companies)</b>	<b>18 %</b>		> 28 bn *
<b>21 Sponsor delegates (5 companies)</b>	<b>10 %</b>		> 100 bn *
✓ 05 Sponsor companies		2 %	
✓ 16 Additional Sponsor Delegates		8 %	

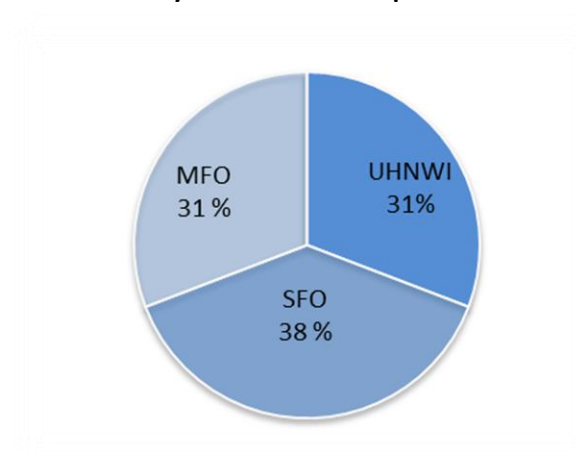
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*Total 100 % > 359 bn\**

*See Appendix: Conservative estimate*

Attendee Composition



Family Office Composition



## Testimonials

Congratulations on an excellent event. It was in a great location with mostly fascinating speakers covering a wide range of topics that had something for everyone. Of course it is the people that make the event and the eclectic mixture made it a very interesting couple of days.

**Julius Bozzino**

Huge thank you - for another very interesting few days. In addition to some excellent content you certainly ensure that those attending are very well looked after at the Dorchester by all the staff. Food was outstandingly good but more importantly I met a variety of interesting and thought provoking people.

**Fiona McKenzie**

Let me please thank you for inviting me to participate in the Family Office Forum. It was exactly as you said it would be and I found it very stimulating and encouraging.

Your reputation for finding influential 'can do' people who need to communicate with each other is certainly not exaggerated. It is indeed very important work that you do. Again, thank you, it was a real pleasure to meet you and your wonderful team. With warmest regards,

**Viscount Chris Portman, Principal, Portman Estate**

My Congratulations to you for reaching a further degree of excellence with the Prestel & Partners Family Office Forum in London. A truly special and memorable two days which expanded one's knowledge in an informative, beneficial and thought provoking way. The various panels and roundtable discussions were of the highest order as were the Family Office attendees. A true reflection on the Family Office Forum's excellent reputation that you had in attendance and speaking on a panel, two of the main principles from the Grosvenor Family.

Thank you very much indeed for a most stimulating and enjoyable two day conference.

**Wendy Coumantaros**

Many thanks for organising such a wonderful conference over the last two days. I thoroughly enjoyed all the speakers and met some interesting people.

**Julia de Boinville**

A big thank you for the conference last week. It was very interesting and good to catch-up with a number of familiar faces one normally doesn't see on events! Thank you also for the excellent event lunch at China Tang. Kind regards,

**JJ Jardine-Paterson, Principal**

Brilliant, informative and refreshingly different! Thank you, **Dominik von Eynern, Principal**

A massive thank you again for letting me be part of what was a smashing program with two excellent days spent in London: All throughout the conference I heard high praise from the attendees about the conference. My heartiest congratulation again for what was really a successful and memorable conference - truly you are the gold standard! Best regards

**Aradhana Khowala, Managing Partner, bridge over Group S.A.**

I have been to numerous conferences over my career and the event last week definitely ranked at the top of the list. The speakers were very interesting and the networking opportunities incredibly helpful and productive. I spoke with many other first-time attendees and they felt similarly. Regards, **Eric Kolodner, Armacom**

I wanted to congratulate you for the amazing event you organized in London. It was most interesting and most appreciated by all participants I could speak to. Very very well done! Thank you and see you soon,

**Daniele Bartoccioni-Menconi, Managing Director, Merrill Lynch**

I just wanted to both congratulate and thank you for an excellent event this week. As someone who has worked both within a Family Office and on the provider side of the fence, I thought that the topics were a refreshing change from many conferences, and provided delegates with a lot of food for thought and challenge as to what they and their Family Offices could do and might want to consider doing. The organisation was superb and hassle free and I very much enjoyed meeting, speaking to and listening to many of the people who attended. **Peter Coulthard, Ernst & Young**

My thanks for the Forum. I found the content and speakers of great interest and marvelled at how the whole event ran on time. **Stuart Thomson, Harrods Bank Ltd**

I could not be more impressed with the Family Office Forum in London you organised. It was amazing and beautifully delivered in every aspect. Warmest wishes, **Caroline Curtis Dolby, Ad.Dip. Psychotherapy, RCN, NCS, BACP.EFT.**

Thank you for including me. I much enjoyed the two days which from my perspective just got better and better and had a super opportunity to network. Best wishes **Rosemary Norris, Advisor SFO**

Thanks a lot and my congratulation for a perfect organization and quality contents: All the attendants have been very happy about the conference! Best, **Prof. Walter Zocchi, University Milano**

# Appendix

Assets Under Management (AUM) of the participants:

Buy Side > AUM 111 bn, Sell Side > AUM 428 bn (Total 539 bn).

We cannot divulge any specific on this information as attendee privacy is of utmost importance to us. Our strict confidentiality of information is an absolute precondition for the attendance of most Family Officers and UHNWI.

## **43 attending UHNWI – AUM > 35 bn**

- The “Asset Top 5” of the attending UHNWI together have an average of AUM 10000m each
- The remaining UHNWI have a median of AUM 600m each

## **56 attending Single Family Offices – AUM > 60 bn**

- The “Asset Top 10” of the attending SFOs together have > 60 bn, an average of > 4 bn AUM each
- The remaining SFOs have a median of AUM 500m each

## **43 attending Multi Family Offices – AUM > 36 bn**

- The “Asset Top 10” of the attending MFOs together have an average of > 3 bn AUM each
- The remaining MFOs have a median of AUM 350m each

Please note that asset managers or bank departments are not counted as MFOs. They are listed as delegates.

## **5 Partner (Sponsors) with AUM > 28 bn**

- “With AUM”: The assets of partners such as Sotheby’s are not included in this list.
- Only 2 out of our 5 Partner/Sponsor corporations are financial service institutions with AUM.

## **22 Delegates with AUM → 18 bn**

- In addition to the partners (sponsors) above, a number of paying delegates attended
- 22 of these delegates were management level financial solution providers with an average AUM of > 1 bn.

The AUM listed here relates to the decision makers present at the Family Office Forum.

Example: Deutsche Bank worldwide AUM > 700 bn, DB PWM worldwide AUM > 270 bn:

We do not use these figures for the purpose of this report, but apply the figures that only attending managers are directly responsible for:

**The total of AUM stated is therefore a conservative estimate.**