

# Family Office Forum London

## Post-Event Report

The annual meeting of UHNWI and Family Offices based in the UK  
3 – 4<sup>th</sup> October 2017 (next London event: 2 - 3 October 2018)

### Introduction

The Family Office Forum London in October 2017 hosted an incredible **149** UHNWI and genuine Family Offices! 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 demand for our events, we are actively preparing Family Office Forums in 2017/2018: [Zurich](#) November 2017, [Singapore](#) December 2017, [Dubai](#) February 2018, [Wiesbaden](#) April 2018, [London](#) October 2018, NEW! San Francisco September 11-12<sup>th</sup> 2018!

### Programme, Speakers and Audience

The forum [programme](#) was based on recommendations and several months of research. However, it is thanks to our 41 [speakers](#) who, like the audience, were predominantly UHNWI or Family Officers, that the Family Office Forum was such a success.

Our participants included royalty, VVIPs, widely recognized specialists and many multi-generational Family Offices and Principals. This collective wealth of knowledge and experience ensured the networking was of the highest calibre and most highly treasured amongst our guests.

### Partners (Sponsors)

The support from our [partners](#) made the Family Office Forum possible. Their feedback has been very positive both in response to their presentations and discussions as well as with the contacts and connections they made during the event.

### Organisers' Summary

We would like to thank all the family officers, family members, experts and in particular, the speakers and partners, who attended the Family Office Forum London 2017. It was undoubtedly a great exchange information, opportunity to 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 2017/2018;  
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

There was an exceptionally high quality thanks to careful vetting and personal recommendations.

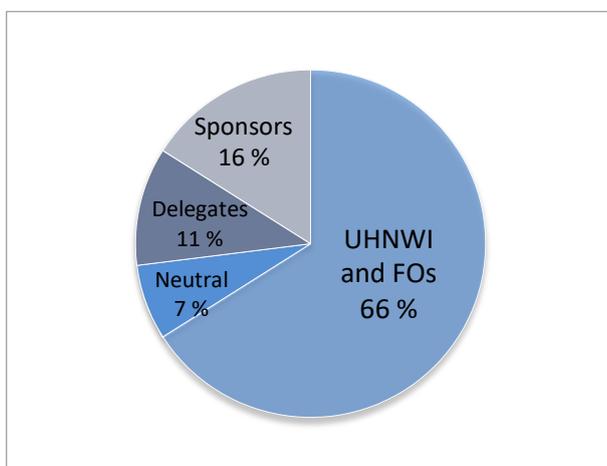
1. 149 UHNWI and Family Offices attended the Family Office Forum
2. The number of UHNWI and Family Offices was significantly higher than the number of Solution Providers (ratio investors: expert delegates 3:1)
3. Excellent level of active participation, in lively debates and networking opportunities

## 226 attendees in total

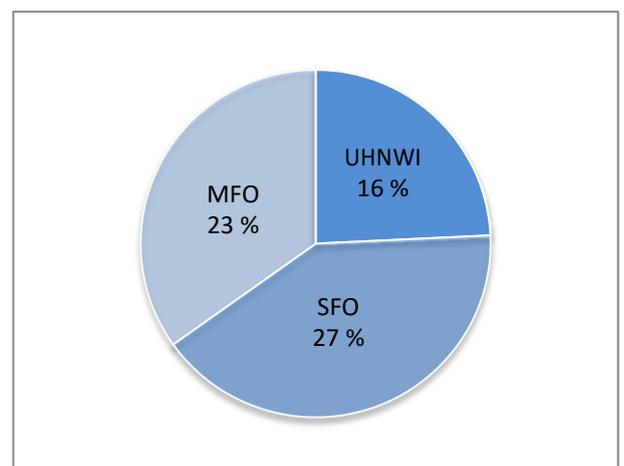
			<i>Assets under Management</i>
<b>149 Family Officers und UHNWI</b>	<b>66 %</b>		
✓ 37 UHNWI		16 %	> 25 bn *
✓ 60 Single Family Officers		27 %	> 60 bn *
✓ 52 Multi-Family Officers		23 %	> 36 bn *
			> 121 bn *
<b>16 Neutrals</b>	<b>7 %</b>		
✓ 07 Neutral Academics		3 %	
✓ 07 Neutral Experts		3 %	
✓ 02 Neutral Guests		1 %	
<b>25 Delegates (24 companies)</b>	<b>11 %</b>		> 22 bn *
<b>36 Sponsor delegates (18 companies)</b>	<b>16 %</b>		> 40 bn *
✓ 18 Sponsor companies		8 %	
✓ 18 Additional Sponsor Delegates		8 %	

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**Total 100 % > 183 bn\***  
*See Appendix: Conservative estimate*

## Attendee Composition



## Family Office Composition



## Testimonials

Thank you all for having me at this fantastic event. It was a great success for me because I met really interesting, committed and engaged people, who were able to share and give insight into ways to improve the work I am doing. The atmosphere was at once relaxed and serious, such that it enabled us to address the issues but at the same time enjoy each other's company. For me, a very successful event all round.

**Dr Auma Obama**

The Prestel events are the best of all the conferences I attend. The quality of the speakers, content, attendees and food is first class. Enjoyed your London Dorchester conference very much. With many thanks,

**Ian W Rice, Principal**

The Platinum of all Family Office Summits, two spectacular days. The highest standard of excellent in every way imaginable!

**Wendy Coumantaros**

The discussions were deeply researched, the topics relevant, the journey meaningful and the operations seamless. There is a reason you are the power house of Family Office Forums globally and every delegate a true believer!

**Aradhana Khowala, CEO & Founder, Aptamind Partners**

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**

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**

Was a fascinating event with thought provoking presentations and an array of sector specialists in attendance. You could not have provided a more welcoming atmosphere.

**Alex Loudon, Principal**

An extraordinary forum with participants of an exceptionally high calibre. Highly entertaining and most relevant.

**Scott & Carmen Young, Gemini Capital Consulting Ltd**

Thank you for an excellent event - great topics and likeminded people. It was worth it to fly all the way to London for that. I look forward your next events. Sincerely,

**Tiia Rohelsaar**

I had a wonderful time attending the Prestel Family Office Forum. The event was very well organised. I also found all the speakers truly engaging. It is my first time this year and I'd be delighted to attend your event again in the near future.

**Tram Anh Nguyen, Niveda Group**

Brilliant, informative and refreshingly different! Thank you,

**Dominik von Eynern, Principal**

May I thank you for your kind invite to the Forum in London which was one of the best I have attended, very organised and diversified event.

**Hameed Razaghi**

A very good conference; we made a number of valuable contacts.

**Kevin Edgeley CFA – Curzon Street Ltd**

Conference was superb and absolutely loved that there were no real sales pitches.

**Eva Tarasova**

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**

As someone who has worked both within a Family Office and on the provider side of the fence it was a refreshing change from many conferences, and I very much enjoyed meeting, speaking to and listening to the people who attended. **Peter Coulthard, Ernst & Young**

## Appendix

Assets Under Management (AUM) of the participants:

Buy Side > AUM 121 bn, Sell Side > AUM 62 bn (Total 183 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.

### **37 attending UHNWI – AUM > 25 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

### **60 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

### **52 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.

### **16 Partner (Sponsors) with AUM > 40 bn**

- Only 8 out of our 16 Partner/Sponsor corporations are financial service institutions with AUM.

### **25 Delegates with AUM → 22 bn**

- In addition to the partners (sponsors) above, a number of paying delegates attended
- 20 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.**