

40 plus Family Offices
and Principals on stage!



Family Office Forum

Zurich, 5th - 6th November



Join us when over 140 English-speaking Family Offices from all over the world meet under one roof!

Case Studies, Key Notes, Panel Discussions and Networking:

Learn from Family Offices and Genuine Experts

How to improve and optimise your operations and ease your workload with new tools and know-how

Improve your operational business

Exchange ideas with other Family Offices on practical topics such as performance measurement

Liquid and Illiquid Asset Classes - keep your finger on the pulse

Hear from other Family Offices and experts how they manage asset allocation

[Overview](#)

[Speakers](#)

[Programme Conference \(Day 1\)](#)

[Programme Conference \(Day 2\)](#)

[Participants](#)

[Preview](#)

[Registration](#)

Page 2

Page 3

Page 4-5

Page 6-7

Page 8

Page 9

Page 10

Free Entry
for genuine*
Family Offices

Partners



Technology Partners



www.prestelandpartner.com



Dr. Manfred J. Adami
Advisor
Single Family Office



Ida Beerhalter
Head of
IOME Family Office



Shaikh Mohammad
Rashid Al-Ballaa
Founder and Chairman
NTG Saudi Arabia



Cherie Blair
Founder
Cherie Blair Foundation



Sascha Klamp
Principal
SFO



John H. Linnartz
Principal
SFO



Konstantin Mettenheimer
Partner
Edmond de Rothschild



Dr. B. K. Modi
Chairman
Spice Global



Richard Nunneley
Lead Advisor
SFO



Sebastian Pech
SFO



Rufo Quintavalle
Principal



Deepen Ram
Managing Partner
Single Family Office



Daniel Sauer
Head of Operations & Systems
Lufin Partners SFO



Dr Zeno Staub
CEO
Vontobel Group



Prof. John F. Tsui
Managing Principal
SFO



Walter Zocchi
Professor in
Family Business

Family Office Forum

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The **Family Office Forum** Zurich is the annual meeting of more than 140 Family Offices from all over the world, a truly global and international gathering of Family Offices held in English:

How does it work? The global Family Office Forum has a very different formula from other events:

- More Family Officers than service providers in the audience, and as stage speakers - by Family Offices, for Family Offices.
- Topics are relevant to Family Offices; the Forum is not a sales show and presentations are not about products.
- Only selected Partners/Sponsors adding clear value may participate. This creates a win/win situation: Family Offices only hear about their interests, and Sponsors/Partners do find that specific interest in their own audience.

The Conference is a networking event with all-day-long networking, plus 5 parallel streams to choose from. See the programme overview - with all presentations and panel discussions – on the next pages!

The Family Office Forum Zurich on 5th - 6th November is taking place in the Dolder Grand, a spectacular mountain top location, overlooking the city of Zurich and its stunning lake. Just 10 minutes by car to the city center and only 20 Minutes to the airport. Expect beautiful surroundings and an exclusive venue perfect in which to meet like-minded peers.

The **Family Office Forum** Zurich is based on:

1. Years of research with over 100 Single and Multi Family Offices, many UHNWI, plus private banks, banks with UHNWI management, academics and 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 business.
3. The long-standing expertise of the partners at Prestel & Partner, in particular 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.

On stage: 90 Family Offices and experts share their knowledge - among them are:

 Dr. Manfred J. Adami Advisor Single Family Office	 Anselm Adams Director PECA – Ltd Reig Patrimonia (SFO)	 Ida Beerhalter Head of IOME Family Office
 Horst Bennin Founding Managing Partner AlpView Capital Partners	 Cherie Blair Founder Cherie Blair Foundation	 Josh Cohen Chief Investment Officer Tyden Ventures SFO
 Gaurav Burman Principal	 Dr Rieki Crins Cultural Anthropologist Lecturer Oxford University	 Dimitri J. Felber Felber FamilienConsulting SFO
 Markus Flack CFP, CEP, CFEP FOCAM AG	 David F. Heimhofer Head of TNFO Terra Nex Family Office Dubai	 Laurel Herman Managing Director Positive Presence
 Steven H. Hirth Founder & Principal S.H. Hirth & Associates	 Sascha Klamp Principal SFO	 Klaus Kuder Vorstand Deutsche Oppenheim Family Office AG
 Bonny Landers Senior Advisor to RS Group (SFO) Senior Advisor to SandAire (MFO)	 John H. Linnartz Principal SFO	 Konstantin Mettenheimer Partner Edmond de Rothschild
 Dr. B. K. Modi Chairman Spice Global	 Dr. Marko Musulin Managing Partner DALE Multi Family Office	 Richard Nunneley Lead Advisor SFO
 Marcello Palazzi, BSc MSc MBA Founder President, Progressio Foundation Co-Founder, B Lab Europe	 Sebastian Pech Managing Director SFO	 Rufo Quintavalle Principal
 Deepen Ram Managing Partner Single Family Office	 Dr. Peter Ritter Senior Partner MFO	 Robert Rubinstein CEO TBLI GROUP
 Dr Ayo Salami Chief Investment Officer Duet Africa Funds	 Michael Prinz zu Salm-Salm Geschäftsführender Gesellschafter Salm-Salm & Partner	 Daniel Sauer Head of Operations & Systems Lufin Partners SFO
 Jens Spudy Gründer und geschäftsführender Gesellschafter Spudy & Co. MFO	 Dr Zeno Staub CEO Vontobel Group	 Prof. John F. Tsui Managing Principal SFO
 Shaikh Mohammad Rashid Al-Ballaa Founder and Chairman National Technology Group (NTG) Saudi Arabia	 Thomas A. Zenner Partner, Head Family Office Nötzli, Mai & Partner AG Family Office	 Walter Zocchi Professor in Family Business

See all 90 speakers at www.prestelandpartner.com



“My total respect for the fact that you bring together the actual, genuine experts....”
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

Family Office Forum Zurich

	Geographic: Local heroes Garden Salon 3	Operations, Internal Garden Salon 2	Investments, Money Matters Garden Salon 1	Liquid Assets Financial Markets The Ballroom	Illiquid Assets Direct Investment The Gallery
07:30-08:30	Registration and welcome with coffee, tea and breakfast snacks				
08:30-09:00	Opening address: Dr. Konstantin Mettenheimer (Partner Edmond de Rothschild Private Merchant Bank)				
09:00-09:30	Keynote: Dr. Zeno Staub (CEO Vontobel Group) An outlook on challenges and opportunities in 2014				
09:30-10:00				Asset Management – Panel discussion: What to look out for in 2014! Dr. Marko Musulin (MFO) Dr. Zeno Staub (CEO Vontobel Group) Dr. Konstantin Mettenheimer (Partner, Edmond de Rothschild) Moderator: Manfred Adami (SFO)	Art & collectables – Howard Lewis (SFO): How to collect and share your collection
10:00-11:00	Morning break in the Ballroom Foyer				
11:00-11:30			International Structures – Dr. Konstantin Mettenheimer (Partner, Edmond de Rothschild): The use of international structures to protect family assets		Culture - Dr. Thomas Bodmer (Salzburg Mozarteum Foundation): Mozart's heritage as a worldwide door-opener.
11:30-12:00	Arabia - Shaikh Mohammad Rashid Al-Ballaa: An insight into trade, wealth and technology sectors in Saudi Arabia		Family Governance – Ida Beerhalter (MFO): Family Value(s) and Governance in a 360 degree perspective		Impact Investment – Robert Rubinstein (TBLI): What is it? How to navigate the jungle
12:00-12:30	Europe GSA - Dr. Marc Herzog: How German, Swiss and Austrian Family Offices invest	Laurel Herman (Positive Presence): Increase your impact, influence and presence	Investment Due diligence – Rosie Norris (SFO): Digging deep into due diligence and monitoring - an interview by Manfred Adami	rhepa	Lunch set-up
12:30-13:30	Lunch break in the Gallery				
13:30-14:00	Europe Liechtenstein – Dr. Peter Ritter (MFO): Asset structuring solutions for entrepreneurial families	The Next Generation – Deborah Webster: Succession and Legacy: What do we pass on and how?	Investment Due Diligence – Sascha Klamp (Principal SFO): Hidden Value Added	Alternatives - Katherina Duong (Metzler): Using options for managed futures	Lunch clean-up
14:00-14:30	Europe Germany – panel discussion: How do German Family Offices invest in Germany? Jens Spudy (MFO), Klaus Kuder (MFO), Moderator Thomas Zenner (MFO)	Philanthropy – John H. Linnartz (Principal, SFO and advisor): Intelligent giving across generations - gain insights into donor intent & strategies on how to engage the next generation	Quantitative portfolio and risk management - Dr. rer. nat. Daniel Ziggel (quasol) On common pitfalls	Alternatives – panel discussion: Prof. John F. Tsui (SFO) Alfred Strebel (Fidelity Worldwide Investment) Peter Munro (European Investment Bank) Gaudenz H. Trapp (SFO) Max von Bismarck (SkyBridge) Moderation: Benedict Götte (CIO)	Social impact direct investments – Deepen Ram (Principal SFO): Social impact direct investments from an investor point of view
14:30-15:00	“Balkan” - Matjaz Princic (EMAC)	Charitable trusts – Cherie Blair: What Family Offices should know when it comes to charity, foundations and giving	Asset management – panel discussion: Why Asset Allocation Due Diligence matters - Lessons learned Rosie Norris (SFO) Sascha Klamp (Principal SFO) Manfred Adami (SFO) Dr. rer. nat. Daniel Ziggel (quasol) Moderator: Markus Hill (Media)	Alpha - Alex Homan (Fidelity Worldwide Investment): Additional Alpha with Actice Extension	Impact Investment - Marcello Palazzi (B Lab): New Economy, New Standards, New Investors: How to measure Impact
15:00-16:00	Afternoon break in the Ballroom Foyer				
16:00-16:30	USA - J. Arne Volkers (MFO): How can international families and family offices get access to the US real estate market?	Family Governance - Dimitri Felber (SFO): Practical family governance using golden rules and proven concepts	Tax & Legal – panel discussion: Best practise to avoid new regulation traps Sebastian Pech (SFO) Dr. Konstantin Mettenheimer (Partner, Edmond de Rothschild)	Smart Beta - Vincent Denoiseux (Deutsche Asset & Wealth Management): Incorporating smart beta strategies in the construction of a diversified portfolio	Impact investment – panel discussion: Deepen Ram (Principal SFO) Martin Rich (Social Finance) Leen Zevenbergen (Entrepreneur and Author) Lothar Jakab (Steinbeis Impact Investing) Dr. Rieki Crins (Cultural Anthropologist)
16:30-17:00	USA - Stephen J. McCarthy (family investment office): Wealth Management Protocol Revisited - the real crux of the investor/advisor relationship from the FO viewpoint	Family Governance - The Italian Family Business and the luxury-fashion brand case as an example – Prof. Walter Zocchi (MFO)		Fahd Rachidy (Edhec-Risk Institute): “More for Less” with Smart Beta Investing	Real Estate - Marcellino Graf von Hoensbroech (HFS): A comparison of historic and temporary real estate portfolios and a solution for current challenges
17:00-17:30		Family Governance - Panel discussion: Insights from decades of family governance Dimitri Felber (SFO) John H. Linnartz (Principal, SFO and advisor) Stephen J. McCarthy (Family Investment Office) Prof. Walter Zocchi (MFO + Academic)			Real Estate – Panel discussion Markus Flack (MFO) Horst Bennin (AlpView) Dhruv Sharma (MFO)
17:30-18:00	Drinks Reception in the Ballroom Foyer				

Family Office Forum Zurich

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08:00-09:00	Registration and welcome with coffee, tea and breakfast snacks				
09:00-09:30	Keynote and opening address				
09:30-10:00		Technology tools – Dr. Peter Dobler (PS Plus): What 200+ Family Office Software customers taught me about technology		Investing families' liquid assets – Dr. Marko Musulin (MFO)	Private Equity – Christopher Stone (SFO): Investing in Private Equity for Family Offices
10:00-10:30	Arabia - Investment opportunities in the Middle-East for Family Offices Abderahmane Fodil (CIO, SFO)	Technology tools - Fritz Gawenus (SFO): The requirements for a Reporting in a Family-Office - which range of complexity should execute a modern Software	Compliance – Klaus Demleitner (MFO): Why compliance management is not a nuisance but a necessity	Ethical investments - Daniel Bruderer (Vontobel): Sustainable Investments – A clarification about Goals, Processes, Results and common Preconceptions	Private Equity – Peter Brock (Ernst & Young): Direct entrepreneurial investments of Family Offices: M&A strategies and their practical execution
10:30-11:30	Morning break in the Ballroom Foyer				
11:30-12:00	Africa – Hugh Scott (AECF): Open for Business? The investment climate and business environment in Africa – what is it like, where is it going, how can it be improved? Lessons learned from a US\$220m fund with 180 deals in 23 countries in Africa	Staff – Panel discussion: Successful recruitment for the Family Office – what are the key elements? Richard More (Curtis Murray Associates) Fritz Gawenus (SFO)	Asset management – panel discussion: Risk management as part of your allocation Rosie Norris (SFO) Sascha Klamp (Principal SFO) Alexander Pick (Allianz Global Investors)	Ethical investments – panel discussion: ESG, social impact, sustainable & Co. put into practice to everybody's advantage Daniel Bruderer (Vontobel) Tess Mateo (CXCatalysts) Susanne Bregy (Rhodanus) Josh Cohen (SFO)	Venture Capital and PE – S. H. Hirth (Principal of Hirth) and Steven Koltai (Koltai & Co) Old school values and new school opportunities
12:00-12:30	Africa – panel discussion: What to look out for in Africa 2015 and beyond Hugh Scott (AECF) Lothar Jakab (Steinbeis Impact) Dr Ayo Salami (CIO, Duet Africa Funds)	Boating, aviation, cars – Panel discussion: Toys for boys, or meaningful assets? Collector Cars: Investing in Pleasure Aviation: Rent or buy Boating: Doing it the smart way Peter Wallman (RM AUCTIONS) Claudio Decurtins (Time Master Business Concierge) Moderator Philippe Kjellgren (Hotel Insider)	Consolidation, Reporting and Performance Measurement - Ian Ledzion (AXIDIA): Notes from the FOs field	Stocks – Jerome Stern (SFO): Handling the matter of stocks as a Family Office	Private Equity and Venture Capital – Panel discussion – Best practise: Peter Brock (Ernst & Young) Anselm Adams (SFO) S. H. Hirth (Principal of Hirth) Christopher Stone (SFO) David Chen, AngelVest Shanghai Moderator: Deepak N. Lalwani OBE Lalcap
12:30-13:00	Middle East - David F. Heimhofer (Principal, MFO): Investment Opportunities in GCC and MENA – How to get extraordinary access to privileged high level projects	Travel and logistics – Panel discussion: Which of these time killers to delegate, and what to look after for yourself! Moderator Philippe Kjellgren (Hotel Insider)	Consolidated reports, performance- and risk-management: Panel discussion Ian Ledzion (AXIDIA) Fritz Gawenus (SFO) Dr. Peter Dobler (PS Plus)	Funds – Charles Elliott (Inflection Point Investments): How to make money from Technology Investments	Lunch set-up
13:00-14:00	Lunch break in the Gallery				
14:00-14:30	India – Deepak N. Lalwani OBE Director, Lalcap India: Economic growth to recover?	Risk & Data - Jean-Luc Freymond (CEO Sage): Threats to Family Offices and how software can help		FX & Currency - Talke and Roman Stauss (Principals): From DM (German Mark) to a Global Portfolio via the RMB (Chinese Yuan)	Lunch clean-up
14:30-15:00	China - Bonny Landers (SFO and MFO): Profitable Sustainable, Responsible and Impact Investing in China?	Risk & Data – Daniel Sauer (SFO): Operational Findings and Solutions for Information and Risk Management in a Single Family Office		Opportunities with FX and FX Volatility for a Family Office - Thomas Suter (Quaesta Capital)	Agriculture – Rufo Quintavalle (Principal): A rock in the storm: farmland investment in an age of climate change
15:00-15:30	China – Prof. John F. Tsui (SFO and Columbia University): A report on hands-on experience with alternative investments in China				Forest – Prinz Salm Salm (Principal SFO and MFO): Forest as an asset class
15:30-16:30	Afternoon break in the Ballroom Foyer				
16:30-17:00	Asia – Lanny Lim: Investment Opportunities in Asian Hedge Funds – a Perspective from a Local Investor (SAIL Hong Kong)				Forest & Agriculture - Panel discussion: How to tackle it as a Family Office? Prinz Salm Salm (Principal SFO and MFO), Oliver Hanke (Partner, Forest Finance) Rufo Quintavalle (Principal) Charles Frewen (Principal SFO)
17:00-17:30	Closing remarks, End of Conference				

Family Office Forum

Zurich, 5th - 6th November

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 genuine* Family Offices. And only relevant partners of Family Offices are 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.

Who is a Partner / Sponsor

Sponsors 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 and sponsors do not present financial products but assist Family Offices in the optimisation of their processes and workload.

If you want to become a partner / sponsor please contact office@prestelandpartner.com

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Family Office Forum

Register Now

5th - 6th March 2014 at The Taj Mahal Palace: The national, annual meeting of Indian Principals and Family Offices held in English



Join us when over 50 Indian Principals and genuine* Family Offices meet in Mumbai!

Reserve your place now!

Free Entry for genuine* UHNWI and Family Offices!

Are you a genuine* UHNWI or Family Office? Then you enjoy free entrance - please contact tobias.prestel@prestelandpartner.com

5th - 7th May 2014 at the Nassauer Hof Wiesbaden: The annual meeting of German speaking Family Offices



Join us when 140 genuine* Family Offices and UHNWI meet in Germany!

Reserve your place now!

Are you a genuine* Family Office or UHNWI ? Then you enjoy free entrance - please contact tobias.prestel@prestelandpartner.com

Do you work with Family Offices? The Family Office Forum is not a sales show, places for solutions providers are strictly limited! To register please visit www.prestelandpartner.com

*Our definition of a Family Office is minimum USD 150 million of assets from only one or few families / wealth owners, and the Family Office is working for one or few (not as a solution provider to many 3rd parties).

Register now as long seats are available:

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

Zurich, 5th - 6th November

Your place at the Family Office Forum Zurich
5th - 6th November 2013 at the Hotel Dolder Grand Zürich

Register Now

	Until 1 February 2013	Until 30 May 2013	Until 30 August 2013	From 1 September 2013	Number
Both Days: 5th and 6th November 2013	€ 2490 + VAT Save € 600	€ 2690 + VAT Save € 400	€ 2890 + VAT Save € 200	€ 3090 + VAT	
One Day Only: 5th or 6th November 2013	€ 1990 + VAT Save € 600	€ 2190 + VAT Save € 400	€ 2390 + VAT 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: _____

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How to register

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Registration



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Cancellation policy

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