

Join us when 100+ Principals, Family Offices, CIOs and Experts meet!



Dr Auma Obama



Lady Jane Grosvenor



Kevin Burrows
Adi Dassler Family Office



Dr. Karl "Charly" Kleissner



Shelly Kapoor Collins



Prof. Dr. Dr. Peter Sester
University St. Gallen



Jan Olszewski



Dr Konstantin Mettenheimer



Family Office Forum

London, 4-5 October 2016, The Dorchester



Where 100+ genuine* Family Offices and Principals meet

Case Studies, Key Notes, Panel Discussions and Networking:

Learn from other Family Offices and select experts

Improve the operational side of your Family Office

Understand how others invest; sustainably, ethically, responsibly and for true impact

Master the essentials such as Family Governance best practice by connecting with peers

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Free Entry
for genuine
Family Offices

*Our definition of a Family Office is minimum £100M in assets and serving one or a few families (not a solution provider to many 3rd parties). Those doing both equally (being investor plus provider) are welcome to join us at a 50% fee.

Partners



www.prestelandpartner.com

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“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

The Family Office Forum London deals exclusively with specific topics for UHNWI and Family Offices, with a focus on Family Governance, Family Office Operations, and how to do good things with your money (sustainable, ethical, responsible and impact investments).

“Hands down the best FO event ever!” Steffi Claiden, Family Office Review

“Ratio of Investors / Providers was very good.” Philipp von Königsmarck, Fidelity

“By far the finest family office conference I have ever attended” Ozi Amanat, SFO

“The large number of principals was especially impressive.” Heiner Weber, SFO

“Great success! Interesting and a rewarding exchange.” Stephan Gerwert, Rigi Family Office

“Made excellent new contacts which I will follow-up on.” Michael Hamke, SFO

“Surpassed all my expectations! Excellent networking opportunities.” Ida Beerhalter, MFO

What makes us different?

The audience: Our event is for Single Family Offices, Principals and Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or solutions to third parties are considered to be solution providers.

The concept: More Family Officers than solution providers on stage. More Family Officers than solution providers in the audience. Network with 100+ UK-based Family Offices.

The content: Family Governance, Next Gen, Assets, Operations, Security, Philanthropy and Impact.

The Family Office Forum in London, 4-5 October 2016 is based on:

1. Help from UHNWI and months of research with Single and Multi Family Offices, private banks, banks with UHNWI management, academics and their 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 lives.
3. The long-standing expertise of the partners at Prestel & Partner, particularly 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.

No product presentations or specific pitches - topics covered are key issues for Principals and Family Offices, such as Family Governance and Operations. These hands-on topics have clear advantages for all participants. The clear focus on added value, trends and strategies means that everyone stands to gain.

Are you a Principal or Family Office? We are delighted to welcome you and offer you privileged free admission! Simply contact: office@prestelandpartner.com
Are you a genuine partner of, or solution provider to Principals or Family Offices? Simply contact: ticket@prestelandpartner.com

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On stage: 28 Family Offices and experts share their knowledge - among them are:



Dr Auma Obama



Kevin Burrows
Adi Dassler Family Office



Dr. Karl "Charly" Kleissner



Jan Olszewski



Dr Konstantin Mettenheimer



Lady Jane Grosvenor



Antonis Schwarz



J. Bradley Hall



Dynamo - Magician Impossible



Francesco D'Amico
Quilvest



Prof. Dr. Dr. Peter Sester
University St. Gallen



Marianne Abib-Pech
LeadTheFuture



Marcel Maschmeyer
Paladin



Dominik von Eynern
Blu Family Office



Shelly Kapoor Collins



Robert Rodriguez

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Ballroom, The Dorchester: Presentations and panel discussions

Adjoining Gold Room: All day networking with refreshments

Adjoining Crystal Suite: CIO roundtables – see pages 8-9

First Day - Morning of October 4th 2016

- 08:00** Crush Hall (access via main entrance): **Registration and Reception with breakfast**
- 08:50** **Family Office Forum opening address by the organisers Katja Mülheim and Tobias Prestel**
- 09:00** **Keynote: From BULLION to BABYLON to BLOCKCHAIN - How Symbols Shape the Way we Value Everything**
J. Bradley Hall, Chairman & CEO, ICON

Family Office Governance – Succession Planning and Next Gen

- 09:20** **Family Strategy: What makes a family successful owners in the long run, and why do so many fail?**
- Managing one of the greatest challenges for all families: wealth preservation in the very long run
 - How the heart of the issue is the family, not wealth management
 - What human ingredients turn a family into successful long term owners?
 - Interaction, values and initiatives needed - observations
- Dr. Konstantin Mettenheimer, trustee** to a number of international and German families; former global chairman and partner of **Freshfields Bruckhaus Deringer** and partner at **Edmond de Rothschild**
- 09:50** **Family Governance Best Practice: practical insights into the Governance of an International Family in its 7th generation**
- Creating the foundations for the successful transfer of family wealth
 - Gaining clarity regarding the beliefs of the family (standards and values) and what is to be expected of one another (expectations and responsibilities)
 - Stimulating the involvement of the next generations in the family wealth and possibly family business
 - Achieving a tighter bond between the family office and family members of all generations
- Francesco D'Amico, Managing Director, Quilvest's family's own Family Office (SFO)**
- 10:20** **Networking and Refreshments - Meet other Family Offices, Principals and experts** and see some very special art presented by **Marek Landa**
- 11:20** **Next Generation: Finding your philanthropic purpose**
- How to define and find your purpose and intent
 - How to translate your purpose and intent into action
 - Changed needs and new philanthropic engagement forms for NextGens
 - Choosing between direct philanthropy and impact investment
- Rupert Scofield, Co-founder, FINCA**
- 11:50** **Next Generation Panel Discussion: Lessons learnt and tips on going forward – from next generation family members, for next generation family members**
- Marcel Maschmeyer, family member**
Jan Olszewski, family member
Charles Lorenceau, family member
Moderator: Shelly Kapoor Collins, Appointee, (USA) National Women's Business Council
- 12:30** **Lunch and networking - Meet other Family Offices, Principals and experts**

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Ballroom, The Dorchester: Presentations and panel discussions

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Adjoining Crystal Suite: CIO roundtables – see pages 8-9

First Day - Afternoon of October 4th 2016

Combining doing good and making profit as a Family Office

- 13:40** **Keynote: How to give Children a Perspective**
Dr. Auma Obama, CEO, SAUTI KUU foundation, member of the World Future Council, member, Barack Obama's election committee
- 14:20** **Impact Investing as a "Next Gen" tool and link between generations – how to:**
- Define and implement impact investing
 - Educate and emotionally attach Next Gens
 - Create a strategy together and find opportunities
 - Deal with external advisors and strategic allocation
- Antonis Schwarz, Guerrilla Foundation**
- 14:50** **Implementing sustainability in your activities and across all generations**
Joseph Tenzin Oliver, Entrepreneur, Artist and Investor
- 15:10** **Networking and Refreshments - Meet other Family Offices, Principals and experts** and see some very special art presented by **Marek Landa**
- 16:00** **A Magic Hello, performed live by**
Dynamo: The Magician Impossible
- 16:20** **Conscious Leadership and Impactful Investing - Making a Difference**
- Conscious leaders shift the focus from reactive problem solving to co-creating the future
 - Those who have the privilege to know, have the duty to act (Albert Einstein)
 - Going all in: 100% impact investing with integrated financial return and positive impact
 - Your investment portfolio as an expression of who you are, an expression of the change you want to see
- Charly Kleissner, Ph.D., Co-Founder Toniic, 100% IMPACT Network, KL Felicitas Foundation, former IT executive in Silicon Valley**
- 16:50** **Making a Difference – Investment in health - a real prospect for long-term return**
- The how and why of investing in health
 - The new investment paradigm
 - Health investment as a real prospect
 - A story from the field
- Desiree Kogevinas, Independent advisor on health infrastructure**
- 17:20** **Mission related / Impact / Social Investing with a Gender Lens**
- Why gender lens investing makes sense
 - How families are moving capital with a gender lens
 - A general overview of family portfolio approaches...
 - ...and gender lens investing across asset classes - challenges and opportunities
- Suzanne Biegel, Individual Investor and Founder/Chief Catalyst Women Effect**
- 17:50** **Champagne reception, opened by Lady Jane Grosvenor**

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Family Office Governance – Managing Risk

09:10 **The Family Office: Helping Global Families Manage Risk**

- Panama Papers, high profile divorces, data leaks, tax changes, public registers.....
 - Global families operating against a backdrop of fast-changing regulation, increased transparency and technological advancement
 - The key “non-investment” risks facing global families are on the rise
 - Role of family office as “risk-identifier” and “risk-manager”
 - Legal mechanisms to manage “non-investment” risk and address governance issues
- Salpy Kouyoumjian, Partner, Boodle Hatfield LLP**

Family Office Governance – Succession planning and Next Gen

09:40 **Leadership tips for the Next Generation**

- What lessons from the corporate world can a Next Gen readily apply in their personal journey to leadership, for themselves and the team around them
- How to define your purpose and intent through a heightened level of self-awareness
- How to understand, influence and leverage your environment (team, internal and external network)
- How to translate your purpose and intent into a compelling vision and strategy and drive flawless execution for impact

Marianne Abib-Pech, Author, former CEO, Shell aviation, CFO, Billiton, MD, GE Capital

10:10 Networking and Refreshments - **Meet other Family Offices, Principals and experts** and see some very special art presented by **Marek Landa**

11:10 **Behavioural Risks in Families: personal experience shared and thoughts from the perspective of a next generation family member**

- A brief definition of behavioral risks
- How do behavioral risks come about?
- Economical implications?
- Thoughts on risk-mitigation strategies

Dominik v. Eynern, next generation family member and Principal, Blu Family Office

11:40 **Better Communication** - bridging the chasm between heart and head

- Practical tips for more effective inter generational communication.
- How to speak and really be understood.

Joanne Sawicki, Communications Specialist, Ceres Communications

12:10 Private Family Office Forum **Lunch at China Tang** - Meet other Family Offices, Principals and experts

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Family Office Governance and Operations: Security

13:40 **Why, how and where Family Offices are exposed to fraud, corruption and cybercrime and how their impacts can be minimised**

- The true nature and scale of fraud, corruption and related risks
- Fraud trends in procurement, investments and noble causes such as Carbon Trading
- Elements of fraud and misdirection by “red flags” & preconceptions
- Profiles of internal and external perpetrators and the importance of intelligence
- Inspiring integrity and effective controls
- What to do when suspicions are aroused

Michael Comer, Fraud Investigator

14:10 **Current State of Cybersecurity** - Threats, Investments and Opportunities to Advance both Security and Innovation
Robert Rodriguez, Chairman & Founder, SINET
Matthew Gould, Director General for Digital and Media, UK Government. Former Director for Cyber Security and Information Assurance, former British Ambassador to Israel

14:40 Networking and Refreshments - **Meet other Family Offices, Principals and experts** and see some very special art presented by **Marek Landa**

Combining doing good and making profit as a Family Office

15:20 **Triple bottom line of social, environmental/ecological and financial - Family Office Insight:**

- Our “long term impact over short term returns” philosophy and how we have focused on impact investing in
- Combatting Climate Change
- Improving Education

David Williamson, Director, Oxygen House

Roy Bedlow, CEO, Oxygen House

15:50 **Triple-bottom-line investing of social, environmental/ecological and financial: mission aligned alpha creation**

- Implications of bringing ESG (Environmental, Social & Governance) integration from the sideshow to centre stage
 - Materiality focus as outperformance enabler
 - Direct investments as key to maximised impact
 - How governance and structure support manager alignment
- Kai Buntrock, Executive Director, CEO, Renew Foundation**

16:20 **Panel discussion: Handling Triple bottom line of social, environmental/ecological and financial**

David Williamson, Director, Oxygen House (SFO)

Kai Buntrock, Executive Director, CEO, Renew Foundation

Antonis Schwarz, Guerrilla Foundation

Moderation: Dr. Konstantin Mettenheimer, trustee to a number of international and German families; former global chairman and partner of Freshfields Bruckhaus Deringer and partner at Edmond de Rothschild

17:00 **Chairman’s remarks and end of the Family Office Forum, London**

First Day - October 4th 2016

CIO roundtables in the Crystal Suite

- 09:20 FinTech**
Financial Services Technologies as Investment
Moderation: Christian Angermayer, serial entrepreneur, investor, principal Apeiron (SFO)
- 10:20 Insights into Investments in West Africa**
Engr. Vincent Gueneau, Investor and operator in Africa; Chairman, Kappafrik Group
- 11:20 Precious Metals**
Platinum's fundamentals and investment case are less well known than those of gold. Discussion, following an introduction to provide facts and context
Moderation: David Badham, World Platinum Investment Council
- 13.50 Trading sports & events to deliver Alpha: The Sports & Events World as an Investment Theme**
Investment intelligence on technology in Sports events: Introduction to an alternative asset class uncorrelated to financial markets and independent of prevailing economic conditions
Moderation: Brendan Poots, Founder & CEO, Priomha Capital
Hubertus Thonhauser, Partner, Priomha Capital
- 16.00 Global mobility and the various Citizenship / Residence Programmes for HNWI**
With the advent of globalisation, planning for residency, citizenship and mobility becomes a crucial aspect of managing one's wealth and ensuring the security of one's family. This session explores the opportunities, the key considerations and the results which can be achieved.
 - What makes HNWI families look for alternative citizenship or residence?
 - A brief look at popular citizenship and residency programmes with a focus on Malta
 - A fresh outlook at moving into the UK and avoiding pitfalls following the Brexit vote
Moderation: Karl Cini, Nexia BT;
along two panel experts on the UK topic:
Louise Somerset, Smith and Williamson and Emma Hendron, Saffery Champness
- 17.00 Family Governance: Structuring and Operating**
Mastering the challenges of remaining united, best practice in maintaining wealth creation plus wealth preservation, and preparing the next generation
Moderation: Prof. Dr. Dr. Peter Sester, University St. Gallen and advisor, Single Family Office

Second Day - October 5th 2016

CIO roundtables in the Crystal Suite

- 09:50 Direct Co-Investments**
SME's: A short case study on access plus selection, and an exchange of experiences and forward looking views
Moderation: Francesco Aldoriso, Akina Partners
- 11:10 Debt as an Asset Class**
 - How can investors make acceptable returns in fixed income, given the worldwide low interest rate environment?
 - How to deal with continued dislocation in many fixed income instruments, created by ongoing regulatory changes
 - A look at fixed income investment opportunities (Situations, not products!) in both the U.S. and Europe
 - Compelling returns in fixed income through niche strategies - best practise, experiences, thoughts shared
Fuller O'Connor, Managing Director, EJV Capital LLC
Peter Stage, Senior Managing Director, Europe EJV Capital LLC
- 13:40 IT and the Web create new themes and financial products**
Insights, plus an open discussion on opportunities and how to deal with them, with a case study on Big Data and Artificial Intelligence as an Investment theme
Moderation: Catana Capital
- 15:30 Tactical Asset Allocation as an investment style**
An insight into multi-family office portfolio construction plus participants experiences / views / best practice tips on dynamic asset allocation and manager selection
Moderation: Kevin A. Burrows, CIO, Adi Dassler International Family Office
- 16:30 Private Equity - direct and deal-by-deal**
Experiences and opinions shared
Del Huse, Managing Director, Roycian

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Background of 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 Family Offices. Only genuinely relevant partners of Family Offices will be 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.

*Our definition of a Family Office; minimum £100M in assets and serves one or a few families (not a solution provider to 3rd parties). Those doing both (family investor and solution provider to FOs) are welcome to join us at 50% of the standard fee.

Who is a Partner

Partners 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 do not present financial products but assist Family Office with optimization.

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

Partners



Family Office Forum

Register now



Zurich, 8-9 November 2016

160+ International Family Offices and UHNWI from all over the globe are expected to join in November.



Dubai, 7-8 February 2017

The MENA region Family Office Forum for 100+ Principals and genuine Family Offices with a clear minority of service providers.



Wiesbaden, 9-10 May 2017

Join us when 200+ genuine* German speaking Family Offices meet.



London, 3 - 4 October 2017

100+ United Kingdom based Family Offices and UHNWI are expected - as per our unique definition below.



Singapore, 5-6 December 2017

100+ Asia based Family Offices and UHNWI are expected, as per our unique definition below.

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Your Registration:

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

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4-5 October 2016, The Dorchester

Register Now

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	Until 31 January 2016	Until 31 March 2016	Until 31 May 2016	From 1 June 2016	Number
Both Days: 4th and 5th of October 2016	£2490 + VAT Save £600	£2690 + VAT Save £400	£2890 + VAT Save £200	£3090 + VAT	
One Day Only: 4th or 5th of October 2016	£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: _____
Permission granted by (name and signature): _____

How to register

In writing: Post us this form, or fax it to +44 (0) 20 3397139 1

Online: www.prestelandpartner.com in the section "Become a Delegate" or email office@prestelandpartner.com

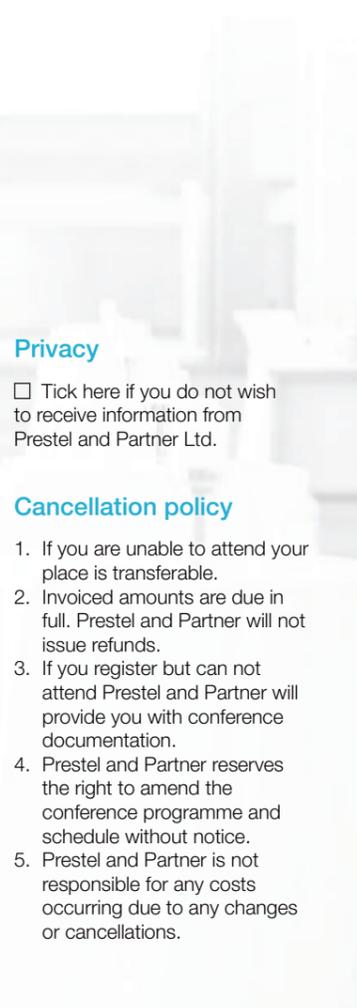
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Payments due within 10 days of invoice date, and in advance of the Family Office Forum. For terms and conditions see www.prestelandpartner.com

Registration



Privacy

Tick here if you do not wish to receive information from Prestel and Partner Ltd.

Cancellation policy

1. If you are unable to attend your place is transferable.
2. Invoiced amounts are due in full. Prestel and Partner will not issue refunds.
3. If you register but can not attend Prestel and Partner will provide you with conference documentation.
4. Prestel and Partner reserves the right to amend the conference programme and schedule without notice.
5. Prestel and Partner is not responsible for any costs occurring due to any changes or cancellations.

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