

Our 2021 Forum speakers include:



Jack R. Selby
Thiel Capital



Gunter Pauli
Serial Entrepreneur



Shanu SP Hinduja
Hinduja Foundation



Natasha Müller
Private Investor



Claudio Cisullo
Serial Entrepreneur



Hans Schöpflin
Schöpflin Foundation



Dr. Vanessa Zamberk
Family Member



Joachim Schoss
Serial Entrepreneur



Frederic Garcin
Family Principal



Dr. S. Dattenberg-Doyle
Queen of Gbi Kpoeta



Anat Bar Gera
Investor, Entrepreneur



Lennart Pedersen
Pedersen & Partners



Tim Schumacher
Serial Entrepreneur
Investor



Asst. Prof. Falko Paetzold
EBS University



Amer Vohora
Family Principal



Philipp Kaufmann
Original Beans



Bernard Saint-Donat
Family Principal



Dr. Maurizio Totta
Private Investor



Family Office Forum | Collection

Zurich 2021 Edition, 13th-14th April, The Dolder Grand

Strategy and Innovation for Family Offices



Join 100+ Family Offices* and UHNWIs

- High family office and investor ratio - network with Family Offices and UHNWIs
- Topics for Families by Families - Family Governance and Investment best practice
- All-day networking – meet prominent peers and have inspiring conversations
- Content-led Programme - No pitches

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FREE ENTRY for genuine* Family Offices and UHNWIs

* Our definition of a genuine Family Office demands a minimum of €150 million and working for one or a few (not a solution provider to many 3rd parties).

2021 Forum Partners



We are delighted to invite* you to join our Family Office Forum in Zurich:

Benefit from a 3:1 private family office and investor:expert ratio and meet 100+ Family Offices and UHNWIs at the event!

The Prestel & Partner Family Office Forum Collection provides an exchange between family offices, wealth-owners, and only a select few partners on best practice in governance and investments.

Strictly no product presentations or specific pitches - topics covered are key issues for Family Offices and UHNWIs. These hands-on topics hold clear benefits for all participants. The focus is on added value, trends, and strategies.

Signature Features and Formats:

- Interactive presentations and engaging panel discussions; with high number of family principals sharing their views
- In-depth round table discussions
- All-day networking, in addition to dedicated networking breaks, lunches, and drinks reception

About Us:

With our six well-established annual family office forum editions in Zurich, Dubai, Singapore, Wiesbaden, New York City, and London, Prestel & Partner is proud to be a global leader in providing a private platform for networking, sharing, and learning opportunities on the most pertinent family office and investment themes.

Editorial Notes:

We are editorially independent; our forum agendas are the result of extensive conversations and months of research with Single and Multi Family Offices, UHNWIs, thought-leading advisory firms and financial institutions on the most crucial and timely topics that keep family principals and their family offices awake at night and offer inspiration to them. We don't take commissions from selling anything, and are committed to staying neutral.

Privacy Considerations:

Our great respect for personal privacy ensures any attendees (including royals, billionaires, former heads of state, and Single Family Office Principals, CIOs and CEOs) enjoy the event with total data privacy.

“

Thank you for hosting this extraordinary conference in Zurich.

Bijan Foroodian
Family Principal

“

Just wanted to say THANK YOU for inviting me to a great and highly informative conference, thoroughly enjoyed it. Congratulations and well done!!

Ankush Mehta
Bespoke Connections

“

The Prestel & Partner conferences are always a brilliant mix of interesting content, high profile attendants and a warm atmosphere. Congratulations!

Miquel Burguet
Marlowe Capital

“

Fantastic event – the topics, presentations and the guests were outstanding!

Christopher Knothe
SFO

Your Advantage

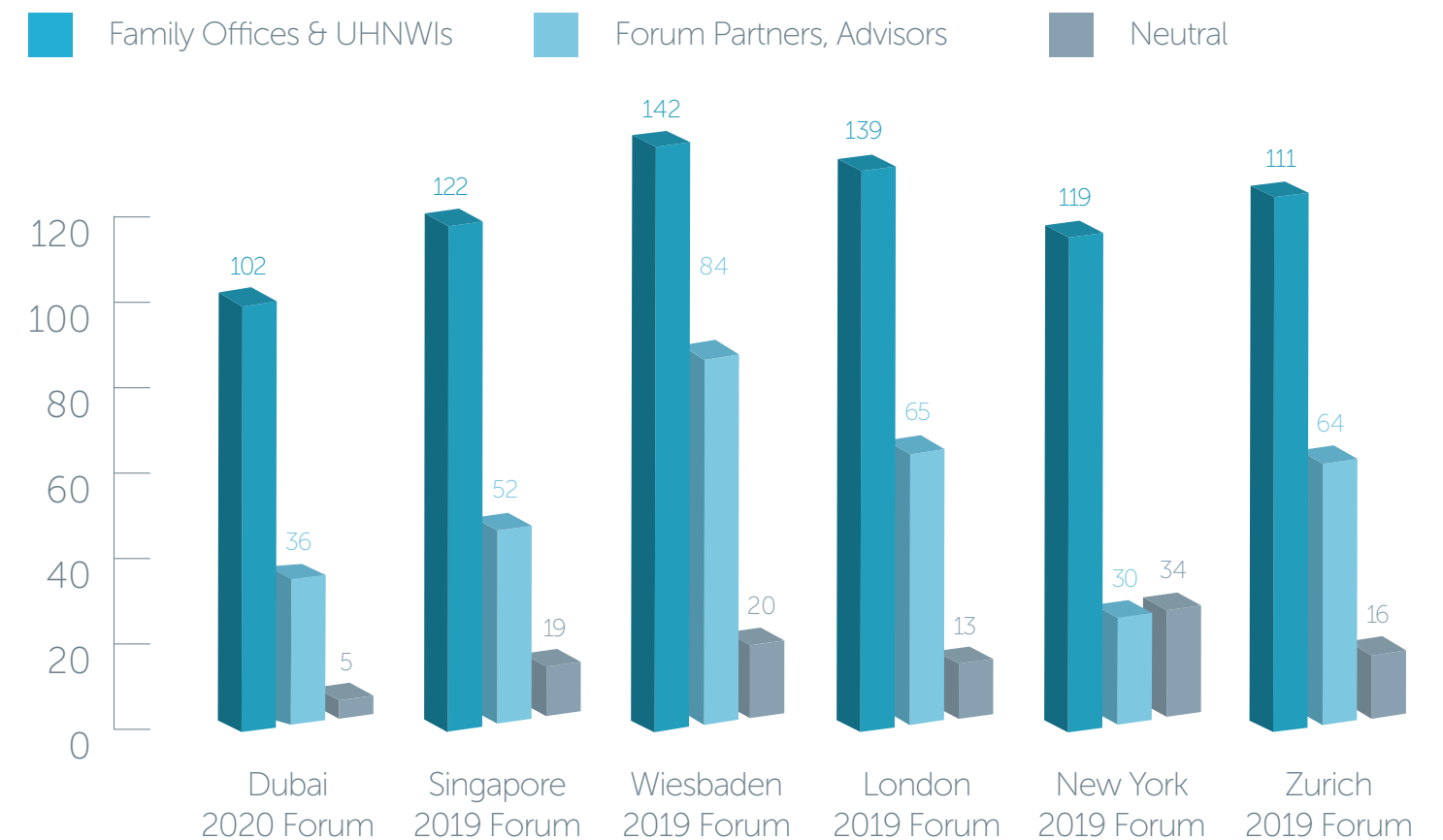
The audience: Our event is exclusively dedicated for Single Family Offices, Principals and Private Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or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

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

The content: Bespoke and curated program with considerable time dedicated to in-depth discussions, knowledge and experience sharing and learning opportunities, and Q&As.

The Prestel & Partner Audience

A majority of Single and non-commercial Multi Family Offices with the profiles of Principal, CEO, CIO, CFO, & COO.



Service providers are from various fields such as health, travel, international structuring, software, education or luxury goods – not uniquely from the financial industry. Partners contribute with and offer their expertise, without any upfront product sales.

	The Ballroom	Garden Salon 1	Garden Salon 2
08:20	Registration and Networking with Breakfast - Meet other Family Offices and UHNWIs		
09:00	Family Office Forum Opening Remarks from Prestel & Partner		
09:10	<p>Modern Times: Managing Risks and Leveraging Opportunities Modern Times: Reflections on Technology and Humanity Toby Ruckert, Pianist, Entrepreneur, AI Investor</p>		
09:30	<p>Keynote Address: The Time of Disruption Has Come - Be the Disruptor • Business as usual, the great unravelling or the great transition - what is your choice? Karl (Charly) Kleissner, Impact Investor, Co-Founder, Toniic</p>	<p>Strong Governance for Family, Business and Office Success The Power of Narratives for a Solid Family Governance • What are the key family governance tools and how these can be best leveraged? • How strong are family constitutions in managing family dynamics? • How narratives can shape and make family governance more effective? Dominik von Eynern, Principal, Family Hippocampus</p>	<p>Technology and Innovation as Investment Theme What's on the Horizon: Family Offices and Technology Investments - A Panel Discussion • How to buy safe, regulated and without unnecessary costs or complications? • How to select and get access to Crypto currencies as a Family Office Hany Rashwan, Co-Founder, CEO, 21 Shares</p>
10:00	<p>Managing a Single Family Office in Challenging Times – A Fireside Chat Interview • Explore what skills you need and what to look out for Claudio Cisullo, Serial Entrepreneur and Investor Interviewer: Joanne Sawicki, Founder, Cerescom</p>	<p>Enhance Your Governance via the Use of Your Family Stories as Narratives • How can families select their best stories that keep them united for generations? • How can we apply stories effectively in family governance? • What are the elements of good storytelling? Valerie Remoquillo-Jenni, Former Family Office Executive Mike Sergeant, Communications Specialist</p>	<p>Alternatives are Going Strong, How the Crypto World is Evolving? - A Roundtable Discussion Ed Hindi, Partner, Tyr Capital</p>
10:30	<p>Digital Transformation both in Operations and in Investments - A Panel Discussion Anat Bar Gera, Serial Entrepreneur, Tech Investor Chair: Joachim von Halasz, Founder, Von Halasz Consulting</p>	<p>Family Offices and Reputation Management - A View From a Family Principal Complemented by an Expert • Learn about reputation mitigation and management best practices and the critical ethical considerations behind these • How technology can support you in maintaining a solid reputation for the family and the various family entities Doris Sommavilla, Principal, Union Hotels Canazei, Sommavilla Costruzioni</p>	
11:00	Networking and Refreshments - Meet other Family Offices and UHNWIs		
11:40	<p>Technology and Innovation: Trends and Opportunities The Power of "Using an Innovation Lens" as a Family Office • Learn how to accomplish your family's mission and objectives by leveraging new technologies and innovations • Practical ways to integrate into your investing and philanthropy Matthew Le Merle, Co-Founder and Managing Partner, Fifth Era and Keiretsu Capital</p>	<p>Nurturing Leadership The Role of the Family Officer • The evolution and current types of family offices • Vital family office tasks and responsibilities as a "Family Officer" in each family office type • What are typical family risk exposures? • How can family risks be addressed? Dominik von Eynern, Principal, Family Hippocampus</p>	
12:20	<p>Lessons from Private Technology Investing • Venture Capital vs. direct, valuation and the opportunity set in a current and post COVID-19 world Jack R. Selby, Managing Director, Thiel Capital</p>	<p>Who is Right for the Top Job • Explore how to find and retain a CIO or an OCIO for non-for-profit organizations Bernard Saint-Donat, Family Principal</p>	
12:40	<p>Impact and Innovation via Technology Tim Schumacher, Serial Entrepreneur, Private Investor</p>	<p>Keynote Interview: Insights on Philanthropy and Entrepreneurship "We want to take responsibility, give the future a lasting voice, and stand up for the interests of young people." Interviewee: Hans Schöpflin, Founder and Chair of the Executive Board, Schöpflin Foundation</p>	
13:10	Lunch and Networking in the Ballroom Foyer - Meet other Family Offices and UHNWIs		

		The Ballroom		Garden Salon 1		Garden Salon 2
14:20		<p>Diversity and Inclusion as an Opportunity</p> <p>Afternoon Keynote Address: The Fight for Equality</p> <ul style="list-style-type: none"> • Paying tribute to the women fighting for equality in the boardroom and in family businesses • Why is equality so important and where will the fight take us next? <p>Shanu SP Hinduja, Hinduja Foundation</p>				<p>Family Office Investments</p> <p>Sustainable Urban Regeneration: Wealth Creation through a Long-Term Impact Investment Strategy in Private Markets</p> <ul style="list-style-type: none"> • How to turn the challenges of environmentally impaired sites, urban sprawl and housing scarcity into a sustainable investment opportunity • Dive into the investment universe of a family-owned investment house and how bold strategies rooted in the real economy are favored to preserve and create wealth <p>Julian Allenbach, Senior Relationship Manager, Edmond de Rothschild Carlos Arias, Senior Private Markets Product Specialist, Edmond de Rothschild Private Equity</p>
14:50		<p>That Girl: A Story of Determination and Courage</p> <p>Cornelia Gantner, Family Principal, Humanitarian Activist</p>				<p>The Family Principal Perspective on Real Estate</p> <p>Chair: Frederic Garcin, Family Principal, President, MCSC</p>
15:20		<p>Thriving via Diversity: Family Office Perspectives - A Panel Discussion</p> <ul style="list-style-type: none"> • Discover Family Office success stories based on diversity and inclusion <p>Amer Vohora, Family Principal Joachim Schoss, Serial Entrepreneur, Private Investor Dr. S. Dattenberg-Doyle, Queen of Gbi Kpoeta, Ghana Muthoni Wachira, CIO, UnCap</p>				<p>Sustainable Forest Management and Increased Use of Wood as a Part of the Climate-Change Solutions</p> <ul style="list-style-type: none"> • What is the status of the forests in Europe? Are forests under threat or are the European forests expanding • How can increased use of wood in construction, energy and other raw materials help in overcoming the climate crisis • The possibilities of investing in forest to achieve financial return and low risk while supporting the green transition <p>Peter Vind Larsen, Baltic Director, HD Forest</p>
15:50	Networking and Refreshments - Meet other Family Offices and UHNWIs					
16:30		<p>Futureproofing Your Structures and Governance</p> <p>Re-Assessing and Re-calibrating Family Office Structures and the Role of Providers</p> <ul style="list-style-type: none"> • Shorten your learning curve by using the knowledge of experienced peers • How to weather a crisis and to whom to turn for advice • Which jurisdiction to choose and for what purposes <p>Frederic Garcin, Family Principal, President, MCSC Natasha Müller, Private Investor Dr. Wing Hin Chung, Head of Investment Promotion, InvestHK</p>		<p>Optimising your Operations</p> <p>Ways to Achieve Security and Simplicity for Complex Wealth - A Panel Discussion</p> <ul style="list-style-type: none"> • How to consolidate wealth in a volatile era whilst mitigating risks and tapping into opportunities <p>Dr. Maurizio Totta, Private Investor James Smith, Founder, JS Consulting Chair: Martin Stadler, CEO, Altoo</p>		<p>Family Office Investments</p> <p>Restructuring Your Portfolio: Key Questions to Ask Yourself</p> <ul style="list-style-type: none"> • Learn why financial institutions cannot help you answer critical issues and what you can do about it • Explore how your investments are impacted by current structural trends and react to a former CIO's thought-provoking observations • Discuss practical approaches to help you structure portfolios and find investment opportunities <p>Thijs Jochems, Private Investor, Former Institutional Investor</p>
17:00		<p>Dealing With the Non-Traditional Risks around Family Office Governance</p> <ul style="list-style-type: none"> • On which pillars should your family office governance be built in general upon its establishment? • What are the more classical governance risks we all need to be aware of? • How do you make sure your chief executives avoid any blind-spots and have their head around Grey Rhinos from a risk management perspective? <p>Jacqueline Hess, Managing Partner, Deloitte Private Juerg Birri, Partner, Head of Legal, Deloitte</p>		<p>Active Reputation Management for Family Offices</p> <p>Octavian Graf Pilati, Family Member</p>		<p>Real Assets, Liquid Assets as an Inflation Hedge and Source of Pleasure</p> <p>James Smith, Founder, JS Consulting</p>
17:30		<p>Science Insights: Blind Spots and Red Flags in Sustainability</p> <ul style="list-style-type: none"> • Cutting-Edge Findings on Sustainability Data and Family Governance • Future-proofing your governance and processes in light of rapid developments in science • Consolidated insights of the Centre of Competence for Sustainable Finance, (the largest university unit as such globally) <p>Prof. Dr. Falko Paetzold, Assistant Professor in Social Finance, EBS University, and Director, Centre for Sustainable Finance and Private Wealth (CSP), University of Zurich Prof. Dr. Markus Leippold, Professor of Financial Engineering, University of Zurich</p>		<p>Marriage and Family - (Old) Rules and (New) Reality</p> <p>Alternatives to classic arrangements</p> <p>Dr. Stephan E. Knobloch, Principal (SFO)</p>		<p>Financing short term trade - A yield enhancing, recession-proof strategy</p> <ul style="list-style-type: none"> • Yield enhancement and capital preservation in times of systematic shocks: While global trade is set to retreat, the trade gap is widening, enhancing financing trade as an opportunity • How financing trade provides low risk as a very liquid sub-strategy, a viable alternative to traditional private credit investments <p>Andreas Schweitzer, CEO, Arjan Capital</p>
18:00	Networking Drinks Reception in The Ballroom Foyer - Meet other Family Offices and UHNWIs					

	The Ballroom	Garden Salon 1	Garden Salon 2
08:00	Registration and Networking with Breakfast - Meet other Family Offices and UHNWIs		
08:40	Family Office Forum Opening Remarks from Prestel & Partner		
08:50	<p>Benefit from a Sustainable Future Keynote Address: Doing Well whilst Doing Good Gunter Pauli, Serial Entrepreneur, Author of Blue Economy</p>		
09:10	<p>Inspired by Biodiversity: The Story of the First Wildlife Virtual Nature Reserve</p> <ul style="list-style-type: none"> Discover the financial risks related to the loss of biodiversity Explore how teleporting yourself to nature may benefit you Learn how engagement with nature can prompt you to do more in nature conservation efforts <p>Adrien Moisson, Owner & Founder, The Wild Immersion</p>	<p>Inspiring Leaders in the Making Navigate your Family's Philanthropic Journey</p> <ul style="list-style-type: none"> Understand the importance of philanthropy for you and your family Explore the purpose, relationships and organizational set-up for impactful giving Learn how to initiate or improve your giving journey <p>Prof. Dr. Peter Vogel, Debiopharm Chair for Family Philanthropy, IMD Business School, Director, IMD Global Family Business Center</p>	<p>It's Personal Insights into Luxury Yachting How to buy or rent: Insights from a life as a Superyacht Captain Captain Brendan O'Shannassy, Board Member, International Superyacht Society, Chair, International Superyacht Society's Captains Committee</p>
09:40	<p>Regenerative Business: Safeguarding Diversity and Good Returns Combined Philipp Kaufmann, Chief Grower, Original Beans</p>	<p>Education and Innovation: How DO We Emerge Stronger from the Crisis?</p> <ul style="list-style-type: none"> Mindsets and skills for innovation and impact Gain insights from the eight months initiative report to co-create the new normal <p>Florian Hoffmann, Founder, CEO, DO School</p>	<p>Health is the New Wealth - Focus on Wellbeing</p>
10:10	<p>Female Members of UHNWI Families as Investors: What to Learn from their Successes Julia Balandina Jaquier, Founder, JBJ Consult</p>	<p>Global Change: Education, Food and Space Günes Seyfarth, Social Entrepreneur, Chancellor of Germany</p>	<p>Impact Investing: How to Learn and How to Implement It Chair: Peter Brock, Co-Founder, German Federal Initiative Impact Investing, Investment Director, 4L Vision GmbH</p>
10:50	Networking and Refreshments - Meet other Family Offices and UHNWIs		
11:30	<p>Impact Investing: Blending with "Best of Institutional" Alternative Investment Structures for Impact Investing</p> <ul style="list-style-type: none"> Successful routes beyond the classic traditional debt or equity financing only Balancing the needs of investor and investee Providing appropriate capital through the right mix of investment structure and pricing Revenue-based financing structures as an example which proved themselves during COVID <p>Kristin Siegel, Head of EMEA, Toniic</p>	<p>Inspiring Leaders in the Making My 10 Challenging Points as a Next Gen Maximilian Gehrman, Next Generation Family Member</p>	<p>Family Office Investments Keynote Address Philipp Rösler, Former German Federal Minister of Economics and Technology and Vice Chancellor of Germany</p>
12:00	<p>Philanthropic Capital as a Catalyst Tool</p> <ul style="list-style-type: none"> How to scale philanthropic activities in education, healthcare, employability, environment Using a first of its kind blended finance model to draw commercial capital into creating impact for the bottom of the pyramid <p>Sophie Eisenmann, Head of Philanthropy, UBS Optimus Foundation</p>	<p>Responsible Ownership: How to Become a Responsible Owner? Key Learnings from the WEF Whitepaper on Roadmap for a Responsible Ownership and Measuring Stakeholder Capitalism Jiawei "Kevin" Ye, Lead, Family Business Community, World Economic Forum; Senior Research Fellow, Global Family Business Research Center, PBCSF Tsinghua University</p>	<p>Fixed-Income Replacement Strategies Chair: Matthias Knab, Founder, Managing Director, Opalesque</p>
12:30	<p>How Specific ways of Micro Finance Work for True and Accountable Impact Edda Schröder, Founder, Invest in Visions</p>	<p>Education Perspectives: The Next Gens and a Sustainable Future Hear distinct perspectives from next generation members of multigenerational families Chair: Dr. Fariba Hashemi, Lecturer, ETH Zurich University</p>	
12:50	Lunch and Networking in the Ballroom Foyer - Meet other Family Offices and UHNWIs		

	The Ballroom	Garden Salon 1	Garden Salon 2
14:00	Impact Investing: Successful ways to approach it How to Increase Family Office Engagement in Impact Investing Lennart Pedersen, Chairman, Pedersen & Partners Chair: Dr. Christin ter Braak-Forstinger, Founder, PVA Advisory	Entrepreneurship 2.0 Entrepreneurial & Investment Impact - How to Bridge for Positive Impact Klaus-Michael Christensen, Former President, Swiss Impact Investment Association	
14:30	A Case-Study from Ethiopia Dr. Sebastian Brandis, Speaker of the Board, Menschen für Menschen Foundation	Reflections on Dealing with a Post-COVID-19 World Prof. Dr. Andreas Heinecke, Founding Partner, Dialogue Social Enterprise	
15:00	How to Get Practical with Impact Projects Prof. Dr. Matthias Waldkirch, EBS University		
15:30	Networking and Refreshments - Meet other Family Offices and UHNWIs		
16:00	Special Feature: Private Peer-To-Peer Discussions Informal Roundtables: Two Parallel Sessions For Private In-Depth Conversations We will be running two separate roundtable sessions with a dedicated moderator belonging to the related peer group. The discussions will allow you to exchange views, opinions, and best practice, with an added benefit of fostering further bonds with your peers.		
	I. Garden Salon 1: Roundtable exclusively designed for wealth owners (principals, other family members, private investors, UHNWIs)		II. Garden Salon 2: Roundtable exclusively designed for non-family office executives, advisors, practitioners, solution and service providers
17:00	End of the Zurich 2021 Edition Forum		

The Prestel and Partner Promise

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

Free participation is exclusive to Family Offices and 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 private Family Office demands a minimum of £150 million and working for one or a few (= not a solution provider to many 3rd parties).

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

2021 Forum Partners



Media Partners 2021



Secure your place at the Family Office Forum Zurich 13th-14th April 2021, The Dolder Grand

Register Now

	Until 31st May 2020	From 1st June Until 31st July 2020	From 1st August 2020	Number
Both Days: 13th and 14th April 2021	€2490	€2890	€3090	
One Day Only: 13th or 14th April 2021	€1990	€2390	€2590	
Prices in € plus 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 private* 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

By phone: +44 (0) 20 339 7139 0

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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

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.

* P&P definition of a Family Office; minimum €150m 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.

Upcoming Editions Of **Our Family Office Forum | Collection**

Register Now



London, 23rd-24th February 2021

Meet 100+ Family Offices and UHNWIs based in the UK and beyond to learn from each other.



Dubai, 9th-10th March 2021

Join 100+ Family Offices and UHNWIs from the Middle East and beyond to discuss Best Practice in Governance and Investments.



Zurich, 13th-14th April 2021

Join 100+ Family Offices and UHNWIs from all over the globe to share insights and learn from each other.



Wiesbaden, 20th-21st April 2021

Join us when 120+ genuine* German-speaking Family Offices meet.



Singapore, 11th-12th May 2021

Join 100+ Family Offices and UHNWIs based in Asia and beyond for this unique forum.



New York, 15th-16th June 2021

Meet 100+ Family Offices and UHNWIs based in North America and beyond to discuss key family office topics.

Family Offices and UHNWI enjoy free entry!

*Our definition of a Family Office is a minimum of €150m in assets from only one or few families / wealth-owners, and the Family Office is working for these families (not as a solution provider to many 3rd parties). Please contact office@prestelandpartner.com
Do you work with Family Offices? The Family Office Forum is not a sales show and places for service providers are strictly limited!
To register please visit www.prestelandpartner.com

Your Registration:

Online at: www.prestelandpartner.com under tab "Become a Delegate" or send an email to: office@prestelandpartner.com

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