

Speakers Include:



Dr. M
Billionaire Entrepreneur



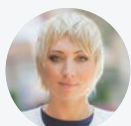
Francesca Agostinelli
Entrepreneur, Philanthropist



Pierre duPont
NextGen, Family Member



Indrani Pal-Chaudhuri
Artist, Entrepreneur, Activist



Viktoriya Tigipko
Investor



Alexa Rachlin
CIO and NextGen



Bijan Foroodian
Principal (SFO)



Susan Danziger
Principal



Ted Roosevelt IV
Banker, Conservationist



Celebrating
12
Years
— 2010 - 2022 —

Family Office Forum | Collection

New York 2022 Edition, October 11th-12th, Harvard Club



Future-Proof Your Family Office

Join us when 100+ Family Offices and UHNWIs meet!

Join 100+ Family Offices and UHNWIs from North America and beyond to explore Best Practice in Governance and Investments

- High private buy-side Single Family Office and Investor ratio
- Topics for families by families – Family Office Governance and Investment best practice
- All-day networking – meet prominent peers and have inspiring conversations

*Our definition of a genuine Family Office demands a minimum of \$150 million and not being a solution provider to those outside the Family Office

FREE ENTRY for genuine*
Family Offices and UHNWIs

2022 Forum Partners



ETON
SOLUTIONS



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Genesis



21SHARES



Join us! Register **online** at www.prestelandpartner.com by **email** office@prestelandpartner.com or **phone** +44 (0) 20 339 7139 0

You are invited to join our Family Office Forum in New York:

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.

“

The Family Office Forum facilitated a productive gathering of decision makers, all of whom were willing to contribute in meaningful ways. The content was rich and multifaceted, covering a range of topics from new governance models to investment ideas, as well as the exploration of new sectors and approaches. The audience was well-curated and provided excellent networking opportunities. Tobias and his team accommodated attendees and maintained a high level of detail oriented service, we would highly recommend.

FullCycle Team

“

We've had a great time networking and getting to know Family Offices from all over the world - an excellent opportunity for us to learn about global philanthropy Best Practices! Thanks a lot for providing us with the opportunity of sharing our Maybach mentoring legacy work, as well as hearing about the innovative strategies others use to enhance their future social impact activities - a very inspiring couple of days.

Ulrich Schmid-Maybach
Maybach Foundation

“

I had a great time speaking at the Prestel & Partner conference this week to talk about leadership lessons.

Peter S Kraus
Philanthropist, Investor, Art Collector

“

Thank you for your hospitality and for a great conference! Bless you - classy, you brought truly amazing people together.

Patrick Reynolds

Your Advantage

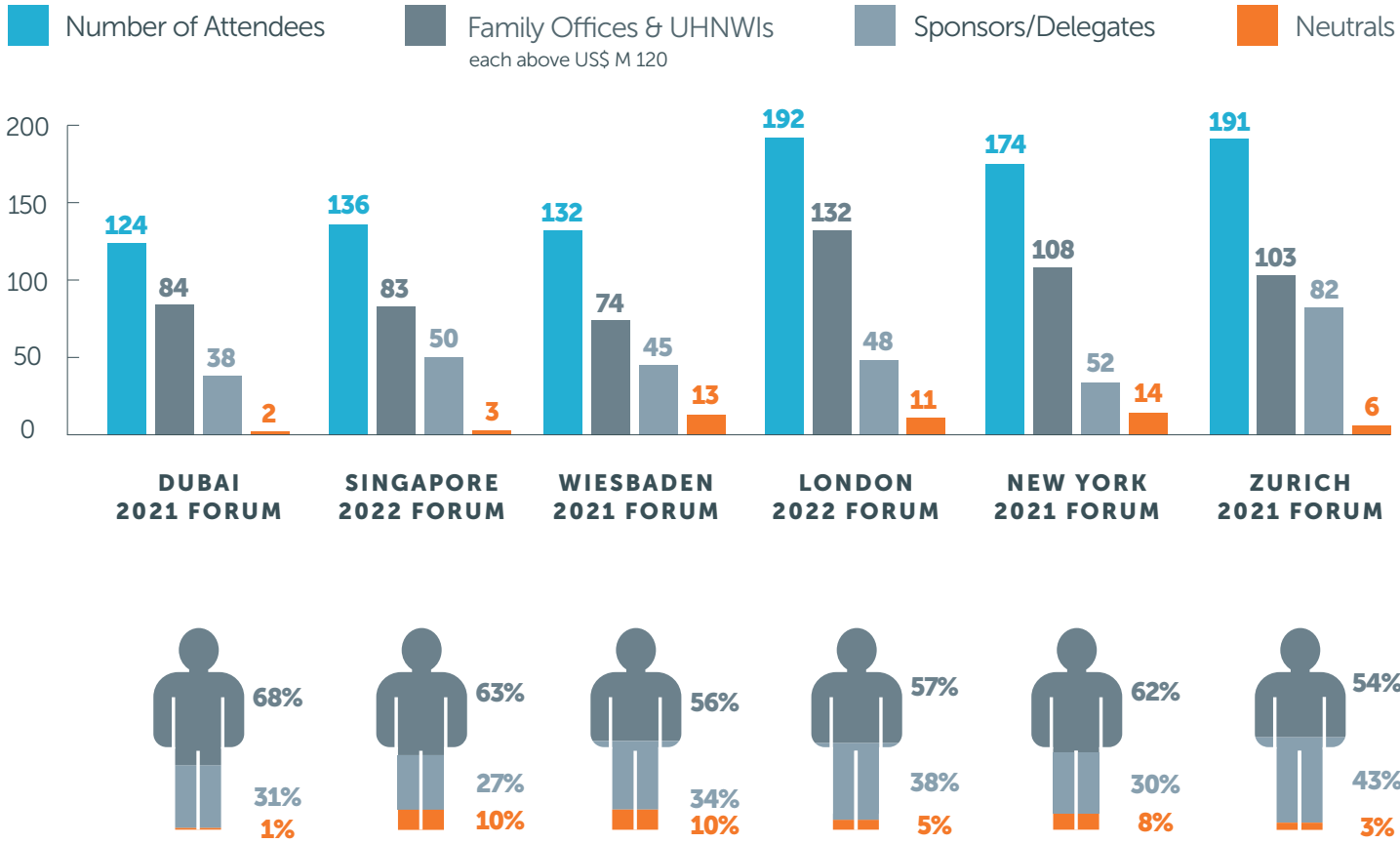
The audience: Our event is exclusively dedicated for Single Family Offices, Principals and Private Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or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

Biddle Room, 3rd Floor: **Presentations and Panel Discussions**

Presidents Room, 3rd Floor: **In depth Roundtable Discussions – see pages 8-9**

Cambridge Room, 2nd Floor: **All day Networking with Refreshments**

Day One Morning - Tuesday, October 11th 2022

08:00 Registration and Networking Breakfast

08:40 Welcome and Introductions from Prestel & Partner

It's Personal

08:50 **Keynote: Living beyond 100 happy healthy wealthy**
Dr. M (Bhupendra Kumar Modi), Billionaire Entrepreneur

09:10 **Mission Driven Investments – How family offices’ empowered lives saved in the first weeks of the war in Ukraine**
Caleb Carr, Founder, **Vita Inclinata Technologies**

09:40 **The Wealth of Mental Health**
How mental wealth affects our lives in modern times, and how it can contribute to a more successful life: Tips and stories on how to sustain generational mental health
Piet Jansen, Director, **Yes We Can Youth Clinics**

10:10 **Fireside chat: Impact-first philanthropy and investing**
Incorporating Impact across the Portfolio
Alexa Rachlin, Managing Director, **Declaration Capital**, Family Member (**David Rubenstein**)
Dominic Kalms, NextGen; Founder & CEO, **B Generous**
Moderator: Annie Knickman Plancher, Vice President, **Social Finance**

10:40 **Morning Coffee and Refreshments** - Meet other Family Offices and UHNWIs

Investment Know How

11:30 **Opportunities in European Distressed Debt**
Adam Phillips, Partner, Head of Developed Markets Special Situations, **BlueBay Asset Management**

12:00 **Alternatives: Blending pleasure with profit**
Fine Wine Investing - a real tangible alternative asset
Atul Tiwari, CEO, **Cult Wines Americas**

12:30 **Digital Asset Roundtable commencing** - see page 8

12:30 **Commercial Real Estate: Self Storage – Choosing the Right Properties, the Right Locations, the Right Time**
In a diversified real estate portfolio – why Self Storage makes sense in an interest rate sensitive environment and outperforms “all” other real estate asset classes annually for the last 25 years (according to NaREIT)?
Scott Dahin, CCIM, CEO, **TriCore Investment Group** – Self Storage Funds
Marcus Faller, EVP, **TriCore Investment Group** – Self Storage Funds

13:00 **Lunch and Networking** - Meet other Family Offices and UHNWIs

Biddle Room, 3rd Floor: **Presentations and Panel Discussions**

Presidents Room, 3rd Floor: **In depth Roundtable Discussions – see pages 8-9**

Cambridge Room, 2nd Floor: **All day Networking with Refreshments**

Day One Afternoon - Tuesday, October 11th 2022

Family (Office) Governance – Learn from Peers

14:00 **50-100 year family inheritance – Insights and practical Tips**
Pierre duPont, NextGen Family Member

14:30 **Insurance as Opportunity Roundtable commencing** - see page 8

14:30 **Panel discussion: 50-100 year family inheritance** – Insights and practical Tipps
Tensions to manage, traps to avoid and strategies to be more successful
Katherine Boas, G4, Chief Operating Officer, **Carl Marks & Co.**
Kraighton Stack, G8, Principal, **Stack Family Office**
Christopher Sugahara, G3, Senior Vice President, **Fairfield-Maxwell Ltd.**
Bijan Foroodian, Principal, G2 Foroodian Family
Moderator: Pierre duPont, NextGen Family Member

15:00 **Tutors International: The advantages of specialist private tutoring**
Adam Caller, Founding Director
Nathaniel Hannan, Current Tutor
Victoria Gibbs, COO
Joanna Duncckley-Philips, Client Account Manager

15:30 **Afternoon Refreshments** - Meet other Family Offices and UHNWIs

Decision making: What men can learn from women

16:30 **Decision making: What men can learn from women**
What happens when you promote Females? Lessons learned in the boardroom, at work and on the street
Indrani Pal-Chaudhuri, “from film and photography to mobilizing millions and impact entrepreneurship”

17:00 **Crypto Roundtable commencing** - see page 8

17:00 **Panel Discussion: Steps to take to prepare (your) children for things to come**
• The importance of education
• Striving for a United Family
Francesca Agostinelli, Entrepreneur, Philanthropist
Indrani Pal-Chaudhuri, “from film and photography to philanthropy and neurodiverse education technology”

17:30 **Unicorns and big dividends through a different approach - Untapped opportunities**
Susan Danziger, Serial Entrepreneur, Principal, Founder & Director, Eutopia
Cindy Gallop, Founder & CEO, **MakeLoveNotPorn**
Wendy Diamond, Social Entrepreneur, Impact Investor, Author, CEO, Board member

18:00 **Networking Drinks Reception** - Meet other Family Offices and UHNWIs

19:00 **End of Day One of the Family Office Forum New York 2022 Edition**

Biddle Room, 3rd Floor: **Presentations and Panel Discussions**

Presidents Room, 3rd Floor: **In depth Roundtable Discussions – see pages 8-9**

Cambridge Room, 2nd Floor: **All day Networking with Refreshments**

Day Two Morning - Wednesday, October 12th 2022

08:00 Registrations and Networking Breakfast

08:40 Welcome and Introductions from Prestel & Partner

Disruption: Media

08:50 Fireside Chat: The change in media consumption, and resulting opportunities
Falon Fatemi; Founder, Firesidechat.com

Disruption: Crypto & Blockchain as a Family Office

09:20 Are American Single Family Offices ready for this? The State of Crypto
Ches Snider, Research Sales US, 21Shares
Eliézer Ndinga, Director Research, 21Shares

09:50 Alternative Assets Meet Blockchain
Bill Wolf, Chief Investment Officer, Archblock
Monica Ho, Institutional Capital, Archblock

10:20 Panel discussion: Adding Crypto assets into an already diversified portfolio

- Huge potential, huge risks - what aspect dominates?
- Trade, borrowing, lending and custody - What is Best Practice?
- How big should a Crypto allocation into a diversified portfolio be?
- Which road to take to partake?

Eliézer Ndinga, Director Research, 21Shares
Leon Marshal, Global Head of Sales, Genesis
Sidney Powell, CEO, Co-Founder, Maple Finance

10:50 Morning Coffee and Refreshments - Meet other Family Offices and UHNWIs

Family Office Operations

11:30 Keynote: Family Office Operations: How to stay ahead in the Digital Age and Deliver Rich Data and Insights

- The Future of Reporting - what will clients expect, and what can family offices deliver?
- Balancing Data, Software, and CX - The challenge of reconciling vast amounts of data, and delivering an exceptional client experience digitally
- The Daily Net Worth Requirement – Next-generation expectations on daily net worth
- Rehumanizing Operations - How to automate routine, mundane workflows and empower staff to delivering value

Rob Mallernee, Founder & CEO, Eton Solutions

12:00 Digital Asset Roundtable commencing - see page 9

12:00 Better stories, bigger impact: The power of smart PR and storytelling
How to drive business growth and protect one's image
Tilo Bonow, Founder & CEO, PIABO, Leading PR advisor to the world's most innovative companies such as Shopify, Stripe, Silicon Valley Bank, Samsung and BMW

12:30 Fireside chat: Where is the grass greener? Insights on international Residency and Citizenship
Eric Major, CEO, Latitude World
Christopher Willis, MD, Latitude North America

13:00 Lunch and Networking - Meet other Family Offices and UHNWIs

Biddle Room, 3rd Floor: **Presentations and Panel Discussions**

Presidents Room, 3rd Floor: **In depth Roundtable Discussions – see pages 8-9**

Cambridge Room, 2nd Floor: **All day Networking with Refreshments**

Day Two Afternoon - Wednesday, October 12th 2022

Family Office Operations

14:00 Establishing or relocating a Family Office - Location analysis considerations: Results from a white paper produced by the Dart Family Office
Sue Nickason, Vice President, Dart Family Office (SFO)

14:30 Japan Investments Roundtable commencing - see page 9

Climate as Investment Theme: Making Money while doing Good

14:30 Panel discussion: Climate Change as Investment Opportunity
Hon. Claudine Schneider, Former U.S. Congresswoman & Author of the first & only revenue neutral Global Warming Prevention Act in 1988
Jeff Davis, Investor, Forester
Dail St. Claire, Institutional Investor, Amalgamated Bank
Ted Roosevelt IV, Investment banker & Conservationist
Moderator: William Doll, Founder, Syneidesis Group

15:00 Trends in energy supply and demand, from oil and gas to renewables

- Leading near-term investment opportunities in energy
- Role of biofuels in decarbonizing transportation
- Clean hydrogen, the "Swiss Army Knife" for a zero-carbon energy system
- The role and projected growth of carbon markets and carbon offsets

Humberto Sirvent, CEO, ARB Energy
Martijn Dekker, Co-founder, Managing Partner, Aurivos Group
Ernest Miller, Chief Executive Officer, Bluescape Clean Fuels

15:30 Afternoon Refreshments - Meet other Family Offices and UHNWIs

16:00 How to Maximize Profits from Climate Mitigation: Win-Win Opportunities
Hon. Claudine Schneider, Former U.S. Congresswoman & Author of the first & only revenue neutral Global Warming Prevention Act in 1988

The Rise of Venture Capital as a Family Office

16:30 Panel discussion: Impact, Venture Philanthropy, and New Models to Invest in Change
Marina Hadjipateras, NextGen
Jennifer Wines, Founder, Invisible Wealth
Fiona Banister, Impact Investor, Decarbonized.org
Moderator: David Homan, Founder, Orchestrated Connecting, LLC

17:00 Panel discussion: Venture Capital as a Family Office

- Where are the opportunities for Family Offices?
- Fund or Direct?

Noah Berkson, Managing Partner, Austin Capital Family Office
Viktoriya Tigipko, Investor
Catherine Shiang, Managing Director, ACA LTD (SFO)
Gaetano Crupi, Partner, Prime Movers Lab

17:30 End of the Family Office Forum New York 2022 Edition

Investment-Themed Roundtables

Day One - Tuesday, October 11th 2022

An exchange of opinions, views and experiences made. Hear from experts and learn from peers: Investing in times of “The New Normal”.

These investor roundtables are held parallel to the family topics on the ballroom stage and allow attendees to join in-depth discussions around specific investment-related topics.

12:30 Digital Asset Investment Trends & The Next Wave of Innovation

About 47% of U.S Family Offices are invested in digital assets:

- Institutional Investment trends in the US,
- current barriers to adoption for Family Offices and
- the trends and innovations that will impact investors

Kyle Verma, Senior Manager, **Fidelity Digital Assets**

14:30 Safe doesn't have to be boring: how insurance helps create opportunity

Moderator: Seth Spreadbury, Vice President, National Family Office Practice Leader, Law Firm Practice Leader, **Marsh & McLennan** Agency LLC

17:00 Are American Family Offices ready for this? The State of Crypto

Moderators:

Ches Snider, Research Sales US, **21Shares** and **Eliézer Ndinga**, Director Research, **21Shares**

Investment-Themed Roundtables

Day Two - Wednesday, October 12th 2022

An exchange of opinions, views and experiences made. Hear from experts and learn from peers: Investing in times of “The New Normal”.

These investor roundtables are held parallel to the family topics on the ballroom stage and allow attendees to join in-depth discussions around specific investment-related topics.

12:00 Alternative Opportunities: How to find stable, non-correlated returns

What approaches, responsibly and effective?

Moderator: Stephen J Luongo, Chief Investment Officer, **AIR Asset Management**

14:30 Japan Investments: What are the opportunities and how to, with what risk and value bias?

Moderator: John Trammell, Managing Director, Global Strategic Relationships, **Symphony Financial Partners** (Singapore) Pte. Ltd.

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

2022 Forum Partners



2022 Media Partners



Secure your place at the Family Office Forum London October 11th-12th 2022, Harvard Club

Register Now

	Prices in £	Number
Both Days: October 11th and 12th 2022	£3490	
One Day Only: October 11th or 12th 2022	£2890	
	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 "Register Here" or email office@prestelandpartner.com

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

Payment Details

Bank transfer: Prestel and Partner Ltd
Account: 46223368, Sort code 30-99-93,
BIC LOYD GB21132,
IBAN GB43 LOYD 3099 9346 2233 68,
Lloyds TSB Bank

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



NEW YORK

11th-12th October 2022

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



ZURICH

10th-11th November 2022

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



DUBAI

31st January-1st February 2023

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



SINGAPORE

16th-17th May 2023

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



LONDON

20th-21st June 2023

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



WIESBADEN

12th-13th September 2023

Join us when 100+ genuine* German-speaking Family Offices meet.

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 "Register Here"
or email: office@prestelandpartner.com By phone: Please dial +44(0) 20 339 71390

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