

Family Office Forum | Collection

Cayman Islands 2023, October 14th -15th, The Ritz Carlton



Shape the Future

Organising your Wealth - what options, how best?
Investing your Wealth - nationally and internationally
Family Governance - ensuring family harmony

The Cayman Islands 2023 event edition of our **Family Office Forum** Collection brings together **wealth owners and decision makers from Family Offices and Family Businesses**, and only a very few selected experts sharing their deep insights.

No delegate passes are sold to solution providers. This event apart from very few sponsor experts is only for Family Offices and Family Businesses. **A safe place to meet peers and true experts to expand your network and knowledge.** Come and get inspired!

Don't miss this special event and apply to **join the Forum taking place 14th - 15th October** at the Ritz Carlton.

2023 Forum Partners



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

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 Cayman Islands:

Benefit from a "safe place" for Family Offices and UHNWIs in the Cayman Islands:

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
- All-day networking, in addition to dedicated networking breaks, lunches, and reception

About Us:

With our eight well-established annual family office forum editions in Zurich, Dubai, Singapore, Wiesbaden, New York City and London, Riyadh and Istanbul, 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.

“

I would like to thank both you and your team for this great event you organised in Dubai. It was a real pleasure to meet some new people in our home base and also some familiar faces.

Vianney Mathonnet
Director
Family Office
Kappafrik Group

“

The powerhouse of Family Office Forums globally, the benchmark for quality.

Aradhana Kowalla
Advisor, NEOM

“

I just wanted to say congratulations to you and the team on the Dubai event, it was well planned and run. Convinced my Board to move our Board Meeting to Dubai on the strength of my positive experiences at your Zurich and London Forums, which I hope illustrates how highly we regard them.

Rakesh Chand
Kaura Foundation

“

The best Family Office conference I have attended. The quality of the speakers and topics was fantastic, the networking opportunity between all was really good as there were genuine FO's represented there and not just product salesmen. The venue and quality of the food was first class.

Richard Jaffee
Single Family Office
Principal

Your Advantage

The audience: Our event is exclusively dedicated for Single Family Offices, Family Business Principals and Private Multi Family Office decision makers 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: A safe place for knowledge, networking and inspiration with wealth owner peers.

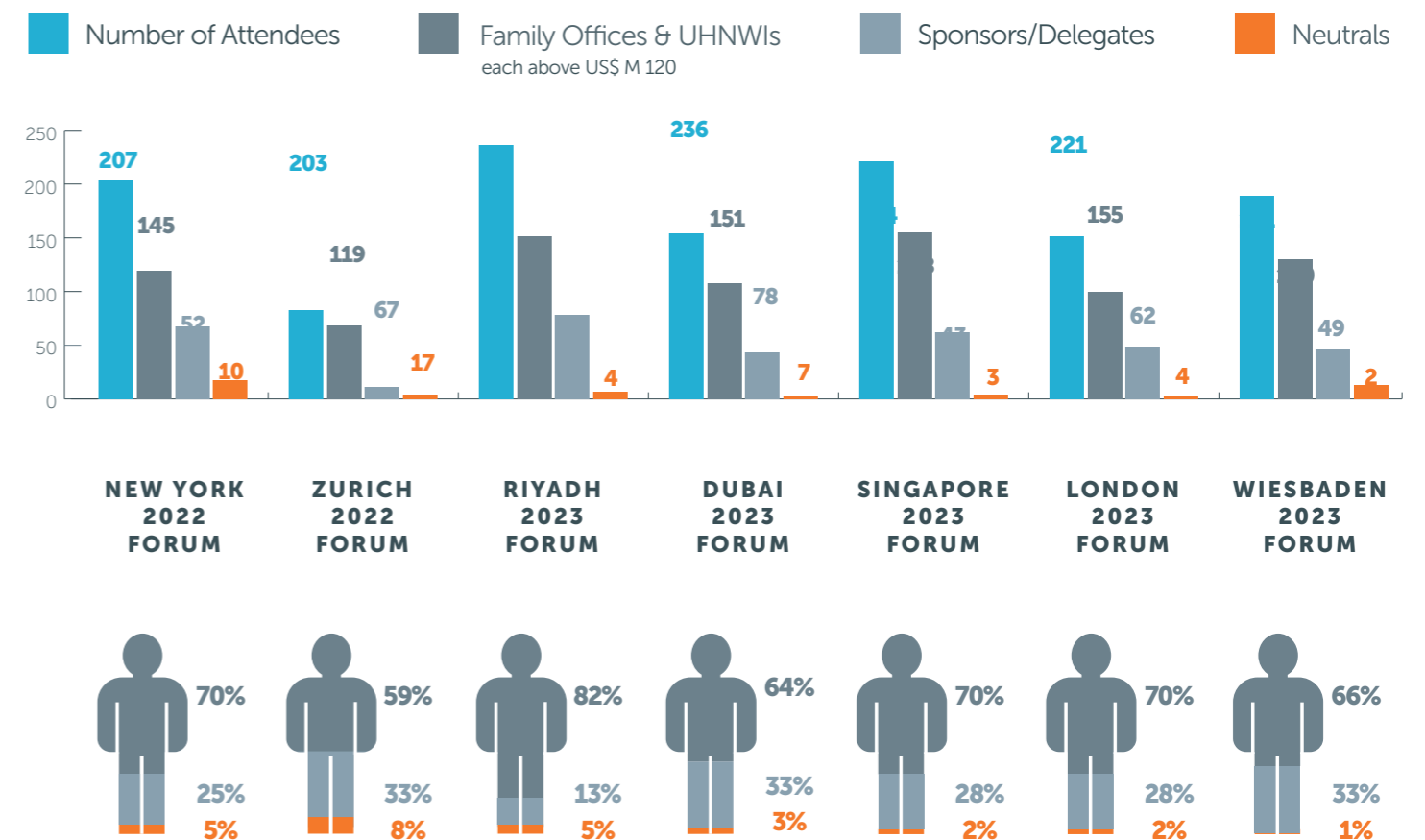
The content: Bespoke and curated program with considerable time dedicated to in-depth discussions, knowledge and experience sharing and learning opportunities, and Q&As.

The Prestel & Partner Audience

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

No delegate passes available for solution providers to join Cayman Islands!

For solution providers to join, only a few sponsor places are available - enquire at ticket@prestelandpartner.com



Service providers are in the clear minority and 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.

PRE-EVENT COCKTAILS

FRIDAY 13TH OCTOBER - 6:00 - 7:30 PM

Ritz Carlton's Saint June restaurant on Seven Mile Beach, in our private area next to the Ophelia Bar (Sunset is at 7pm):

Informal Pre-Event cocktails for those who wish to mingle and get to know their peers before the event starts officially the next day.



Morning of Saturday 14th October 2023

Optimize your Set-Up

7:00-9:00am

Breakfast

In the La Prairie Restaurant: Breakfast Buffet



9:00-9:30am

Welcoming Address From Katja Muelheim and Tobias Prestel

The founding partners of Prestel and Partner share their macro view

9:30-10:30am

Establishing or Relocating a Family Office: Location Considerations

Results from a white paper produced by the Dart Family Office

Dart Family Office (Private SFO)

10:30-11:20am

Morning Break

11:30am-12:30pm

Professionalising the Personal:

Why & how smart families are borrowing practices from the corporate world and how Cayman fits into this trend

Philip Paschalides, Partner, Private Capital and Trusts Group, **Walkers (Cayman) LLP**
Scott Jones, Senior Counsel, Private Capital and Trusts Group, **Walkers (Cayman) LLP**

12:30-2:30pm

Lunch Buffet at Taikun restaurant:

Asia stir-fry station and sushi, fusing the finest grade of authentic ingredients and sophisticated presentation, Taikun delivers an experience worthy of its name, an ancient Japanese term of respect from which the English 'tycoon' was derived.



Afternoon of Saturday 14th October 2023

From Peers, for Peers

2:30-3.30pm

Roots and Wings: The Freedom of Learning with Travelling Tutors

A presentation sharing helpful tips and knowledge through case studies

Adam Caller, Founding Director, **Tutors International**

Victoria Gibbs, COO, **Tutors International**

Joanna Dunckley Phillips, Client Account Manager, **Tutors International**

Luke Besant, Educational Marketing Consultant, **Tutors International**

3:30-4:20pm

Coffee Break

4:30-5:30pm

Making a Family work together: Synchronizing Generations

A Fireside Chat

Alyx Van der Vorm, NextGen

Dominik von Eynern, London resident NextGen of a German Family Business involving several generations

Octavian Graf Pilati, Austrian Entrepreneur and Principal of a family with a history dating back to the year 1000

5:30-6:30pm

From Champagne to Chaos: The Truth about Wealth and Addiction

How to talk about what you cannot talk about and why you should do it anyway

Oliver Neubert, Founder & Chairman, **NEOVIVA AG**

7:00-9:30pm

Dinner Buffet on Seven Mile Beach:

Supervised by French Frederic Morineau who has presided the kitchens of some of Europe and the Caribbean's finest establishments, discover how sophisticated (and tasty!) the various local flavours can be.



Morning of Sunday 15th October

It's Personal - from Stingrays to Racehorses

7:00-9:00am

A boat trip to Stingray City: (Optional)

Feeding and playing with some of the largest Southern rays in the Caribbean



9:30-10:30am

Kicking Tyres the Right Way: Our View on Investment Due Diligence

Sharing experiences made and lessons learnt

Constance "Connie" Morgan, wife to **John Adams Morgan** (direct heir to the founders of **JP Morgan, Morgan Stanley**, and **US president Adams**), helping him e.g. in due diligence regarding art collection or investments

Cassandra Heilbronn, CEO of the Family Office of a Saudi Royal family, responsible for overseeing strategy, investments, reputational management, and general operations internationally

Moderator: **Catherine Shiang**, Managing Director, **ACA LTD** (private SFO)

10:30-11:30am

"Gold is money. Everything else is credit." (J. P. Morgan)

You know all about Gold? Here are News for you:

How to combine the solid value of a real asset with easily accessible liquidity

Christian Rauch, CEO, **Degussa Goldhandel GmbH**

Christian Bardenheuer, Senior Relationship Manager, **Degussa Goldhandel**

Alfredo Munera, Senior Relationship Manager, **Degussa Goldhandel**

11:30am-1:00pm

Sunday Brunch

This is more than refreshing, revitalizing food and beverages. This is our special audience having time together to interact, exchange views and opinions, get to know each other even better and to deepen existing, or build new friendships



Afternoon of Sunday 15th October

It's Personal - from Stingrays to Racehorses

1:00-2:00pm

Win or Fail: What You Need To Do to Make Your Family Business Sustainably Successful

Thomas A. Zenner, Managing Partner, **Family Office 360 Grad AG** - as former head of a German national bank's Multi Family Office, Thomas now based in Switzerland looks after an exclusive small group of families and principals

2:00-3:00pm

Dopamine Loops, Performance & Blue Ocean Thinking:

"Why Not Being On Your A-Game Is Costing You Billions"

Andy Murphy, Personal Advisor & Performance Coach, for 21 years a trainer & Mentor for celebrities, Fortune 500 CEOs, Hollywood producers, world champions, Tech founders and Royalty

3:00-4:00pm

Family Break Up: What to Do When Succession Goes Wrong

A Panel discussion

Prof. Dr. Anabel Prinzessin von Preussen – Ternès von Hattbury, a family history including Germany's Emperor, and a family of wealth and an extensive academic and professional record

Manfredi Mattei Filo della Torre, Board President, **Fondazione Alberica Filo della Torre**

Octavian Graf Pilati, Austrian Entrepreneur and Principal of a family with a history dating back to the year 1000

Moderator: **Dominik von Eynern**, London resident NextGen of a German Family Business involving several generations

4:00-5:00pm

The Joy of Horse Racing

"For those of you who want a little bit more out of life"

Franck Mourier, horse racing/breeding expert (over 25 years' experience), a licensed trainer in 16 jurisdictions. Franck has sold horses to the biggest investors in the game such as **Sheikh Mohammed bin Rashid Al Maktoum**, or **Stonestreet Stables**

5:00pm

End of the Family Office Forum Cayman Islands 2023



Philip Paschalides is a partner at **Walkers (Cayman) LLP** in the firm's Private Capital & Trusts Group. He leads a specialist team which structures and establishes single family offices in the Cayman Islands and assists with the deployment of private capital in acquisitions and other commercial transactions.



Scott Jones is a Senior Counsel at **Walkers (Cayman) LLP** in the firm's Private Capital & Trusts Group. He acts for UHNWs, Family Offices and asset managers. He specializes in establishing Family Offices and family investment vehicles and advises asset managers on the formation of private equity funds and hedge funds.



Dominik v. Eynern comes from a business family which is now in its 5th generation. He holds a BSc in Economics and a MSc in Finance, worked in the international investment banking industry. He's a founding member and director of Family Hippocampus Ltd.



Octavian Graf Pilatis family focused on forestry and tourism. After studying mechanical engineering in the UK and Vienna, he took charge of his family's financial crisis in August 2015 stemming from a bad investment in 2014. Today, he runs a Vienna-based family office specializing in distressed assets and venture capital.



Oliver Neubert, Founder & Chairman, **NEOVIVA AG**. With over 30 years' experience of working with addicts, supporting them in achieving and maintaining abstinence. MSc in Addiction Studies from King's College London.



Cassandra Heilbronn, CEO of the Family Office of a Saudi Royal family, responsible for overseeing strategy, investments, reputational management, and general operations internationally.



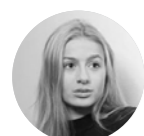
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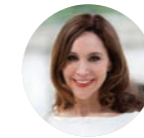
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Andy Murphy is a renowned personal advisor and the go-to neuroplasticity coach to HNWI, Digital Brand Founders, Tech and Finance, and High Performers who are in rapid growth.



Alyx Van der Vorm graduated top of her class from Harvard in Computational Neuroscience. A former professional Marathon runner, Alyx's passion is wellness, at college she became aware of the intense loneliness Gen Z face. She launched a Gen Z social media platform in Miami & London, reducing the time to make plans to 62 seconds.



Prof. Dr. Anabel Prinzessin von Preussen – Ternès von Hattbury, a family history Including Germany's Emperor, and an extensive academic and professional record



Adam Caller founded **Tutors International**, a world-class private tutoring company for UHNWs that specialises in full-time residential private tuition. Tutors International is based in Oxford, England, but has a global client base. Adam is a well-known and accomplished figure in premium education worldwide.



Victoria Gibbs is the COO at **Tutors International**, the bespoke education provider for high and ultra-high net worth families. With a background in audit from PwC, Victoria joined the corporate team at Tutors International in 2011. She had a pivotal role in the structural transformation of the company and continues to facilitate its evolution as a growing enterprise.



Joanna Dunckley Phillips has worked with **Tutors International** for over 12 years, initially as a full-time tutor and, more recently, working on the corporate side in the role of Client Account Manager. She started tutoring mathematics and flute to her peers, aged 16, and has been teaching or learning ever since. She is fully fluent in French, Spanish and English.



Luke Besant represents **Tutors International** as our marketing specialist. His focus is alternative education, ultimately becoming a founding member of a marketing apprenticeships provider in the UK and a PR communications consultancy specialising in education.



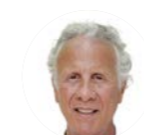
Thomas A. Zenner, Managing Partner, **Family Office 360 Grad AG** - as former head of a German national bank's Multi Family Office, Thomas now based in Switzerland looks after a small and exclusive small group of families and principals



Manfredi Mattei Filo della Torre is an active alternative and real estate investor, through a private asset management firm. He is secretary General and president of the board to Fondazione Alberica Filo della Torre, a foundation active in legal training and academic collaboration with Rome's prime universities, set up by Pietro Mattei in memory of his wife in 2012.



Alfredo Munera, Senior Relationship Manager, **Degussa Goldhandel GmbH**. International Attorney with over 30 years experience as a CEO and Corporate and Investment Banker in LatAm, USA and Europe.



Christian Bardenheuer, Senior Relationship Manager, **Degussa Goldhandel GmbH**. Telecom CEO, Executive and Entrepreneur in the USA, Europe and Asia with over 30 years experience on Strategic Transactions and Corporate Advisory. Art & Photography Gallerist and Collector.



Christian Rauch is Managing Director at **Degussa Sonne/Mond Goldhande**, representing the globally active and leading precious metals trader globally, also as spokesman for the managing directors. Previously CEO at Montblanc Italia, and Four years as CEO of UNIOPIU' in Milano, Italy.



Catherine Shiang serves as Managing Director at **Asia Capital Advisor Ltd.**, a single family office. In this capacity she has participated in transactions from various roles, limited partner, principal and advisor with venture capital, private equity, mergers & acquisitions and long short hedge funds.

Upcoming Editions Of Our Family Office Forum | Collection

Register Now



CAYMAN ISLANDS

14th-15th October 2023
The Ritz-Carlton

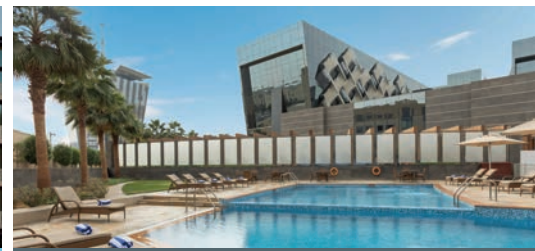
Meet 40+ Family Offices based in North America and beyond to discuss key family office topics.



ZURICH

9th-10th November 2023
The Dolder Grand

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



RIYADH

13th-14th February 2024
Crowne Plaza

Join 80+ Family Offices and UHNWIs from the Middle East and beyond to discuss Best Practice in Governance and Investments.



DUBAI

20th-21st February 2024
The Palace Downtown

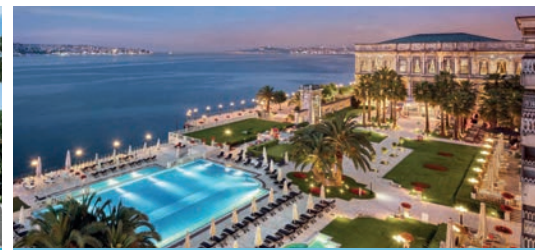
Join 100+ Family Offices and UHNWIs from the Middle East and beyond to discuss Best Practice in Governance and Investments.



SINGAPORE

23rd-24th April 2024
Raffles Hotel

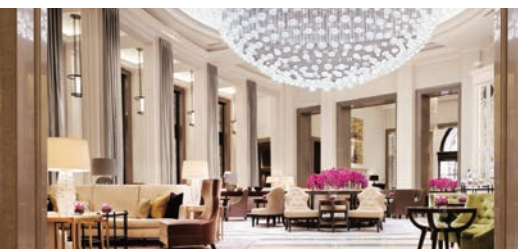
Join 100+ Family Offices and UHNWIs based in Asia and beyond for this unique forum.



ISTANBUL

29th-30th May 2024
Çırağan Palace Kempinski

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



LONDON

2nd-3rd July 2024
The Corinthia

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



WIESBADEN

10th-11th September 2024
Nassauer Hof

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



NEW YORK

8th-9th October 2024
The Harvard Club

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 "Register Here"
Email:
office@prestelandpartner.com
By phone:
+44(0) 20 339 71390

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