

Family Office Forum

Singapore, 5-6 December 2017, The Fullerton Hotel

Ballrooms 1 and 2: Presentations and panel discussions

Ballroom 3: CIO roundtables – see last page

Foyer: All day networking with refreshments

First Day - Morning of December 5th 2017

08:00 Registration and Reception with breakfast

08:50 Family Office Forum opening address by the organiser Tobias Prestel

09:00 Keynote: The History of Money
J Bradley Hall, Icon (Dubai and Switzerland)

Family Governance, Succession Planning & Next Generation

09:30 **The Emotional Side of Money and Wealth**

- Individuals within families becoming contributing leaders
- Operating in a safe space with each other
- Developing a governance model which holds the individual, the relationships with each other
- Setting guiding principles by the family for the family

Francesco Lombardo FEA, Managing Director, **Veritage Family Office MFO** (Canada)

10:00 Networking and Refreshments - **Meet other Family Offices, Principals and Experts**

11:00 **Panel Discussion: Family Office Structures to avoid Family Disputes**

- Best practice in dividing functions between Family and Business, family members or Family Office
- Contrasting Governance Regimes: Non-Family Business vs. Family Business
- Combining Family and Business Governance - Differentiation between management and ownership succession
- How to successfully distribute power in multifamily constellations - How to gain buy in from all family members

Jerome Duval Fleury, Principal, SFO (France)
Eva Law, Founder & Chairman, **Association of Family Offices in Asia** (Hong Kong)
Yash Mishra, Managing Director, **Taurus Wealth MFO** (Singapore)
Moderator: Leon Kantor, Director, **PWN** (Australia)

11:30 **Global Taxation Structures as Criteria for Family Estate and Succession planning**

- Tax & estate planning – a global overview
- Family, asset and business structuring – goals and challenges
- The Malta Option for international families

Kenneth Camilleri, Senior Partner, **Chetcuti Cauchi Advocates** (Malta)

12:00 **The European Family Office approach – a good fit for Asia?**

- Advantages of servicing wealthy families with a comprehensive and independent approach
- Range of services that can also appeal to Asian families
- Experiences from the viewpoint of a European Family Office
- Implementation of such an approach

Oliver Muggli, Partner, **Mandorit MFO** (Liechtenstein & Hong Kong)

12:30 **Building Family Legacy through Citizenships and Residence Programs**

- What is the quality of one's Nationality?
- What's driving investor migration for Asia's wealthy families?
- Key considerations for HNW families in relation to residence and citizenship planning
- Global trends and developments in investor migration

Dominic Volek, IMCM, Managing Partner, Head Southeast Asia, **Henley & Partners** (Singapore)

13:00 Lunch and networking in the Ballroom Foyer - **Meet other Family Offices, Principals and Experts**

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14:00 **Keynote: Be a Future-Shaper and Re-Imagine the Boundaries of Your Business**
Actively shape the future of your market space, or be left in the wake of others who are. Redraw market boundaries in a way that assures the ongoing relevance and growth of your organization.
Gabor George Burt, Author, Innovation Pioneer, Human Motivation Expert (USA)

Investing as a Family Office (Part 1)

14:30 **Portfolio Construction as a Family Office**

- Ratio of Make or Buy
- Implementing ESG Impact
- Experiences shared and lessons learnt
- Asset Class Preferences

Peter Gibson, Principal, **Dynasty Family Office MFO** (Singapore)
Ed Peter, CEO and CIO, **Duxton Capital Pty Ltd SFO** (Australia)
Stephen Diggle, Principal, **Hrothgar SFO** (Singapore)
Dr. Thorsten Querg, Senior Partner, **FOCAM AG MFO** (Germany)
Peter Douglas, Director, **CAIA Foundation** (Singapore)

15:10 Networking and Refreshments - **Meet other Family Offices, Principals and Experts**

16:10 **Climate Change as Investment Opportunity**

- How Impact Investing changed from something exotic, to standard for the finance world
- How Private Equity and Impact Investing profitably help stop climate change

Dan Choon, Dyan SFO (Luxembourg & Hong Kong)

16:40 **The role of 'entrepreneurial risk' in the private investment portfolio**
Often families, having realised in whole or in part, the value of their investment in a successful family enterprise, seek to invest in new entrepreneurial endeavours

- How important is "entrepreneurial risk" as an investment category?
- Asset allocation strategy vs opportunistic investing
- In-sourcing vs outsourcing and managing your involvement in business
- Family members as venture capitalists: Managing relationship risks

David Werdiger, Author, strategic advisor, and technology entrepreneur (Australia)

17:10 **Joint Ventures, Co-Investments and working with other Families: Close Encounters of the Third Kind**
It is not easy to establish a JV generally speaking and even less so when partners are family shareholders. This is because (a) family businesses have strong values and (b) JVs are not about taking control over the other or melting one into another, but about combining cultures into one third object, which then develops its own culture. Not easy for families to accept. But when it works, it can be very powerful. JVs between families require mind openness, respect and trust.
Grégoire Amigues, Partner, **JAB Investments SFO** (Singapore)

17:40 Drinks reception at the Post Bar in The Fullerton - **Meet other Family Offices, Principals and Experts**

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08.30 Registration and Reception with breakfast refreshments

09.20 Family Office Forum welcome address by the organiser Tobias Prestel

Family Office Strategy

09.30 Keynote: From Compliance to Advantage - Mapping the Global Transition for Investors
Dr. Hazel Henderson, Author, Economist (USA)

10.00 Keynote: Success and Impact - We as investors can do good, feel good, and profit: Profitable Impact Investing
Arvind Narula, Chairman & Founder, Urmatt Group SFO (Thailand)

10.30 Experiences shared: Doing good while making money – Best Practice in ESG, Impact & Co

- An overview on the Impact Investing Market, including trends and data from current research
- Motivations and Strategies of Wealth Owners
- What impact investing really means; Myths, Real Talk, Real Returns and Case Studies
- Avoiding the Traps: Key Lessons Learned – and how to find good deals, Impact Investment deal flow

Thierry Sanders, CEO and impact investment scout, **Putera Sampoerna** SFO (Indonesia)
Jérôme David, Principal (Singapore)
Hong Suong Nguyen, President & CEO, **Starise Investments** SFO (Vietnam)
Gregory Stuppler, Founder & Principal, **Sustainable Pte. Ltd., SURF Companies** SFO (Singapore)
Moderator: Robert Rubinstein, Chairman, **TBLI** (Netherlands)

11.10 Networking and Refreshments - Meet other Family Offices, Principals and Experts

“It’s Personal”- Inside Perspectives

12.00 Fireside Chat on Education – both aspects: for you as parent, and for you as an Investor

- Global Education Trends and Opportunities
- Developing the Schools of Tomorrow
- Investing in Education and our Families
- The future of education in the 21st Century

Richard Henry, Head of School, **GEMS World Academy** (Singapore)
Sebastian Barnard, Admissions, **GEMS World Academy** (Singapore)

12.30 The Vulnerability of Family Offices
Family Offices are based on trust. Sometimes, revealing information on wealth is a source of tension and empowers unscrupulous or incompetent third parties to undermine financial and social status as well as safety. How to manage.
Steven Kay QC, Chairman, **Oculus Financial Intelligence** (UK)
Rupert Boswall, Chairman/Senior Partner, **RPC** (UK)

12.50 Lunch and networking in the Ballroom Foyer - Meet other Family Offices, Principals and Experts

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14:00 How to Avoid or Treat Self-Destructive Behavioural Patterns exhibited by Teens and Young Adults

- A look into mood or eating disorder, depression, fear of failure, drug-, game-, sex- or gambling- addiction, ADHD, ADD or ODD
- Dealing with addiction and mental health care behavioural disorders / problems

Piet Jansen, Director, **Yes We Can Youth Clinics** (Netherlands)

Investing as a Family Office (Part 2)

14:30 Transforming Agriculture & Food technologies into sustainable and robust solutions

- What Investors can learn from Israel, the start-up nation
- Advantages of the Israeli Agriculture and Food investment eco-system
- Translating science into business - The challenges of getting from ideas to products
- Copia's model as a SFO backed entity and it's impact

Ohad Zuckerman, **Copia Agro** (Israel)

15:00 Networking and Refreshments - Meet other Family Offices, Principals and Experts

16:00 “Real Assets” such as Agriculture, or Wine

- Why we are scared of interest rates and what we are doing about it
- The Agricultural story (and why we own 5% of Australia's viticulture too...)

Ed Peter, Group Chairman, **Duxton Capital Pty Ltd** SFO (Australia)

16:30 Panel discussion: Real Estate as Family Office Investment

- Global trends – data and facts
- Going direct, or indirect through funds?
- Deal sourcing - family and friends, or professionals?
- Geography – local where you know, or global opportunities?

Dr. Thorsten Querg, Senior Partner, **FOCAM AG** MFO (Germany)
Conrad Tsang, Founder and Chairman, **Strategic Year Holdings Limited** MFO (Hong Kong)
Moderator: David Pieper, Principal, **Optimus Prime Family Office** MFO (Germany and Russia)

17:10 Panel discussion: Private Equity as Family Office Investment

- Going direct, or indirect through funds?
- Deal sourcing - family and friends, or professionals?
- Geography – local where you know, or global opportunities?
- Lessons learnt and Best Practice

Dr. Thorsten Querg, Senior Partner, **FOCAM AG** MFO (Germany)
Dr. Ole Mensching, Partner, **TruVenturo** MFO (Germany)
Moderator: Conrad Tsang, Founder and Chairman, **Strategic Year Holdings Limited** MFO (Hong Kong)

17:50 Chairman's remarks

18:00 End of the Family Office Forum

CIO roundtables

An exchange of views, opinions and experiences held in an open format:
Anonymous, no pre-registration needed, simply join and listen or speak up

First Day - December 5th 2017

11:00 **Cryptocurrencies:** ICO's and the Bitcoin Bubble - What Happens Next?

Moderator: J Bradley Hall, Icon

12:00 **Venture Capital:** Exchange of Views and Experiences – Lessons learnt

Moderator: Dr. Ole Mensching, Partner, TruVenturo MFO

16:00 **Governance:** Rise of Women with Wealth and in Leadership Positions

The shifting face of wealth is affecting the investment industry: Some data on the rise of female billionaires in Asia, what this means, and how the corporate sector and family offices are faring in terms of female participation at senior management, followed by a discussion on the role of gender in leadership roles.

Moderator: Caterina Meloni

Second Day - December 6th 2017

11:00 **Creating an Impact Portfolio:** Sourcing Deal Flow, Strategies, Successes and Failures

Moderator: Jérôme David, Principal

12:00 **Real Estate:** The successful ways to operate as Family Office Investor

Moderator: David Pieper, Principal, Optimus Prime Family Office MFO