

Join us when 100+
Family Offices and
UHNWIs meet!



Jonathan Warburton
Family Principal



Tue Nyboe Andersen
Next-Gen Family Member



Selale Zaim Gorton
Next-Gen Family Member



Diederik H. Brenninkmeijer
Next-Gen Family Member



Nasser Al Shawaf
Family Principal



Doris Sommavilla
Next-Gen Family Member



Bjoern von Siemens
Next-Gen Family Member



Brittany Kaiser
Entrepreneur



Dhruv Ghulati
Entrepreneur



Celebrating
10
Years
— 2010-2020 —

Family Office Forum | Collection

London 2019 Edition - 25th-26th September, Claridge's



Future-Proof Your Family Office

Join 100+ Family Offices and UHNWIs: Best Practice in Governance and Investments

- 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

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Register:

Free Admission*
for Principals or Family Offices
Solution Providers simply register at
office@prestelandpartner.com

*Our definition of a Family Office is minimum £150m 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.

Forum Partners



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

Family Office Forum

London 2019 Edition - 25th-26th September, Claridge's

We are delighted to invite* you to join the Family Office Forum London 2019:

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 so much for two excellent days. What wonderful company, interesting topics and all in such excellent surroundings. ”

Edward Hoare, Philanthropist

“ Let me please thank you for inviting me to participate in the Family Office Forum. It was exactly as you said it would be and I found it very stimulating and encouraging. Your reputation for finding influential 'can do' people who need to communicate with each other is certainly not exaggerated. It is indeed very important work that you do. ”

Viscount Chris Portman, Principal, Portman Estate

“ Thank you all for having me at this fantastic event. It was a great success for me because I met really interesting, committed and engaged people, who were able to share and give insight into ways to improve the work I am doing. The atmosphere was at once relaxed and serious, such that it enabled us to address the issues but at the same time enjoy each others' company. For me, a very successful event all round. ”

Dr Auma Obama

“ Prestel and Partner did a great job fostering collaboration around shared interest and respect – creating relationships in a short period of time, with people from different countries, backgrounds and perspectives. ”

Josh Cohen, SFO

“ 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

Family Office Forum

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Your Advantage

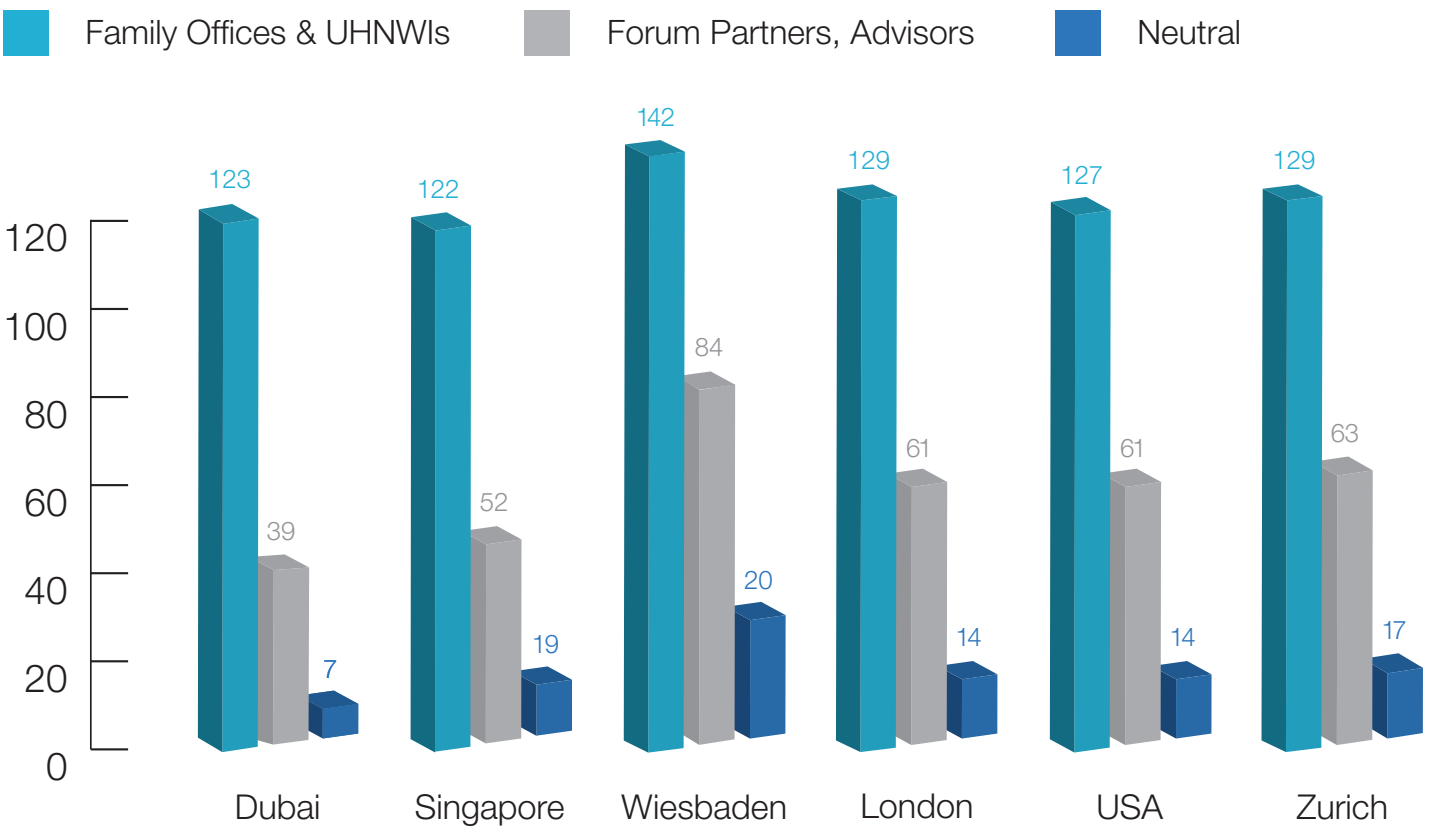
The audience: Our event is exclusively dedicated for Single Family Offices, Principals and Private Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or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

Ballroom, Claridge's: Presentations and panel discussions

Ballroom Reception: All-day networking with refreshments

Mirror Room: CIO roundtables – see pages 8-9

Day One Morning, Wednesday, 25th September 2019

- 08:15** Registration and Networking with Breakfast
- 08:55** Family Office Forum Opening Remarks from Prestel & Partner
- 09:00** **Keynote: Geopolitical Trends and the Implications for Family Office Investment Strategies**
- The current state of play in US foreign policy
 - US-China relations and the validity of the “cold war” analogue
 - Sequencing of escalation in trade and geo-economic conflict
 - Trade is the battle, trade is the “war”: Dual-use technology at the epicenter
 - Macro-economic investment implications and opportunities for Family Offices
- William Callanan**, CIO, **Syzygy Investment Advisory Ltd**
Former Commodity Analyst and Portfolio Manager, **Soros Fund Management**
Member, **International Institute for Strategic Studies** London
Benefactor, **Oxford Institute for Energy Studies**
Board of Overseers, **Hoover Institution, Stanford University** California

Best Practice in Family Office Governance (Part One)

- 09:30** **The Power of Branding and Aligned Communication**
Explore how the Warburton family thrives, for example by always enhancing their quintessentially British brand. Warburtons are not only one of Britain's biggest grocery brands, their products are in fact the most bought food and drink products in the UK
Jonathan Warburton, Chairman, **Warburtons**
- 10:00** **The Inci Holding Case Study - Insights into a Robust Structure to Assure Continued Success**
Şelale Zaim Gorton, Board Member (3rd Gen), **Inci Holding**
Perihan Inci, Board Member (2nd Gen), **Inci Holding**
- 10:30** Networking and Refreshments - Meet other Family Offices and UHNWIs

Education 2.0

- 11:00** **How to Transfer Knowledge to Your Next Gens**
Using the Power of Intellectual Capital and Creativity for Your Family Office
Ethan Koh, 4th Generation Member, Founder, **Ethan K Couture**
Nabila Maqsood, Stylist, Philanthropist
Prof. Dr. Andreas Heinecke, Social Entrepreneur
Moderator: **Daniela Herrmann**, Founder, **Topan**
- 11:30** **Bridging Health Care's Innovation Gap - A Fireside Chat on the Need of Research and Education**
Dr. Bharath Takulapalli, Founder & CEO, **INanoBio Inc.**
Interviewer: **Joanne Sawicki**, Founder, **Cerescom**
- 12:00** **Turning a Disadvantage to Your Advantage - An Interview**
Learn from a next gen's insights how to effectively integrate autistic staff into a team. In an era defined by soaring rates of mental health diagnosis, explore how to build the best workspace and enjoy the most success within your team
Angeline Francis Khoo, Entrepreneur
Mark Borkowski, Founder, **Borkowski**
- 12:30** **That Child – A Working Model on Unconventional Education**
How a school in Singapore makes accessing education work for the unconventional thinker and Learner i.e., those with learning challenges, learning differences and learning “dis”orders
Sharon Solomon, Founder, CEO, **The Winstedt School**
- 13:00** Lunch and Networking in the Ballroom Foyer - Meet other Family Offices and UHNWIs

Ballroom, Claridge's: Presentations and panel discussions

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Mirror Room: CIO roundtables – see pages 8-9

Day One Afternoon, Wednesday, 25th September 2019

Play it Safe: Transparency and Accountability

- 14:00** **The Challenges of Protecting Yourself from Online Criminals and Misleading Information, and the Opportunities of “Good” Data**
- Understand why and how Cyber Criminals are now targeting Family Offices
 - Ethical considerations on online data plus reflections on centralised data
 - The quality of content we deal with and the importance of fact checking
 - Conflicting public and private lines of interests and the profound impact of AI, Data, Mobility
- James Tamblin**, Director, **Marclay Associates Ltd**
Brittany Kaiser, Whistle-blower, **Cambridge Analytica**, Founder, **Digital Asset Trade Association**
Dhruv Ghulati, Founder, **Factmata**
Bjoern von Siemens, Entrepreneur, Investor
Moderator: **Toby Ruckert**, Musician, Entrepreneur, Inventor
- 14:45** **It's Personal: Stonewalling and Succession Risks within Families**
- Psychological Safety
 - Implications for Transparency
 - Link to Succession Risks
 - Sharing Real Life experiences
- Doris Sommavilla**, Principal, **Union Hotels Canazei, Sommavilla Costruzioni**
Dominik von Eynern, Family Member; Partner, **Blu Family Office**

Best Practice in Family Office Governance (Part Two)

- 15:15** **Different Aspects of Family Governance: “By failing to prepare, you are preparing to fail” - How to avoid the avoidable**
- Matrimonial law; how prenuptial agreements, divorce and shareholder's agreements may have an effect on family dynamics
 - Receive an offshore perspective on structures for succession purposes; how to plan for the next generation
- James Stewart**, Partner, **Penningtons Manches Cooper**
Nancy Chien, Partner, **Bedell Cristin**
- 15:45** **Practical Governance in Family Office Investment Decision Making**
- How to assess Investment opportunities and potential asset allocations objectively?
 - Implications of different approaches; Illiquid vs. liquid as a Family Office Investor
 - What happens when multiple parties are involved?
- Philip Mayer**, Head of UK Family Office Team, **Barclays Private Bank**
- 16:15** Afternoon Networking and Refreshments - Meet other Family Offices and UHNWIs
- 17:00** **Governance Sustainability: What Works and What Fails**
- Most Family Businesses and Family Offices have Governance in place.... yet it often fails
 - What are the key factors in creating a Governance model that sustains the family and shareholders unity?
- William Vickers**, 7th Gen Member, **Mary Randall Vickers & Co**
Brian Thompson, Next-Gen Head, **Musgrave Family Education Committee**
Elizabeth Bagger, Next Gen, **AVS Danmark**
Bilal Zein, COO, **Quanon Capital**
Moderator: **Francesco Lombardo**, **Veritage**
- 17:40** **Effective Structuring for Multi Generational Wealth and Considerations to maintain Family Relations**
- The use of fiduciary vehicles such as Trusts/Foundations to structure family wealth
 - Thoughts on implementing a family constitution includes criteria such as values, philosophy, distribution philosophy, fund management, philanthropy
- Nasser Al Shawaf**, Family Principal, **Al Bawani**
Matthew Norman, CIO, **Kenjiro Private Office**
Maurice Ostro, Serial Entrepreneur, Philanthropist
Nainish Bapna, CIO, **Veddis Single Family Office**
Moderator: **Blane Queripel**, Client Director, **PraxisIFM**
- 18:20** Networking Drinks Reception hosted by Lady Jane Grosvenor and the First Light Trust
- 19:30** End of Day One - See you tomorrow morning!

Ballroom, Claridge's: Presentations and panel discussions

Ballroom Reception: All-day networking with refreshments

Mirror Room: CIO roundtables – see pages 8-9

Day Two Morning, Thursday, 26th September 2019

08:30 Networking with Breakfast Refreshments

09:15 Family Office Forum Opening Address from Prestel & Partner

Achieving Great Returns Whilst Making a Positive Impact

- 09:20** **Tales from Families for the Road Ahead - A Panel Discussion on Impact Investing**
- Why to join the growing group of Impact Investors
 - What range of impact-led investment opportunities are out there?
 - Learn from families on their approach in impact investing
 - Hear hard-won lessons about starting out and pursuing this journey
- Diederik H. Brenninkmeijer**, Next Gen Family Member
Tue Nyboe Andersen, Next Gen Family Member
Dimple Sahni, Managing Director Impact Investing, **Anthos Family Office**
Kenneth Winther, Family Principal, **Moonwalk**
Herman Winther, Next-Gen, **Moonwalk**
Moderator: **Damian Payiatakis**, Head of Impact Investing, **Barclays Private Bank**
- 10:00** **The Private Sector's Role in Combating the Climate Crisis**
- Learn from concrete examples
 - Explore best practice on efficient business models
- Stephan Nicoleau**, Managing Director, **FullCycle**
- 10:30** **Combining the Investment Themes AgriTech, FoodTech and Cannabis**
- The use of Tech as a sustainable investment
 - A case study exploring the current Cannabis space
- Dooma Wendschuh**, Co-Founder, CEO, **Province Brands of Canada**
- 11:00** **Networking and Refreshments - Meet other Family Offices and UHNWIs**
- 11:30** **Conflict and Crisis: Innovations for Impact**
- How Amnesty International is harnessing technology and innovation for a global response to major challenges such as crisis, conflict and refugees
 - Preventing the unwanted, such as violence or human rights abuse
 - Helping people to rebuild their lives
- Tirana Hassan**, Global Director of Crisis Response, **Amnesty International**
Gordon Cooper, Co-Founder, **TCC Global**

Ballroom, Claridge's: Presentations and panel discussions

Ballroom Reception: All-day networking with refreshments

Mirror Room: CIO roundtables – see pages 8-9

Day Two Afternoon, Thursday, 26th September 2019

12:00 **Insights from an Impact Investor: Sustainable Forestry in South America**

- Beating myths about impact investments in Emerging Markets
- Impact Investments in Sustainable Forestry
- High-added-value forestry, as an alternative to land destruction
- Case study: attractive ecological, social, and financial returns

Dr. Maurizio Totta, Impact Investor, Entrepreneur

Future-Proof your Family Office

- 12:30** **The Missing Piece of Longevity**
- What is the missing piece to achieve generational continuity and family longevity?
 - How a triple crisis did lead to the creation of the world's first Family Health Office
 - Explore how you and your family could benefit from having a Wellbeing Trust
- Feisal Alibhai**, Founder, **Qineticare**
- 13:00** **Lunch and Networking in the Ballroom Foyer - Meet other Family Offices and UHNWIs**
- 14:00** **Making Sense of Genes – The Scopes and Opportunities in BioTech Ventures**
- A recap on the revolution in genomics over the last 20 years, i.e. the million fold price drop to sequence a genome
 - The resulting impact on healthcare, business and the environment
 - What impact has genomics for Family Offices?
 - Hard facts, revealing and thought-provoking insights into challenges and opportunities
- Prof. Dr. Ewan Birney**, Director, **EMBL's European Bioinformatics Institute**
- 14:30** **Protecting Your Investment Capital**
- Fiscal challenges, failures, and success models around investments
 - Considering the non-fiscal challenges of wealth and preparing the next generation for a relationship with money and affluenza
- Dr. Catherine Waldrop**, Chief Scientific Officer, **CI Investments**
Gordon Grant Curtis, CIO, **CI Investments**
Dr. Ronit Meshie Mai Lami, PhD, Business & Family Wealth Psychology Across Generations
- 15:00** **How to Destroy Your Family Wealth Successfully**
- Equally entertaining and useful insights: Important lessons to be learned from 130 years of a German Family
- Maximilian Gehrmann**, NextGen Family member
- 15:30** **End of the Family Office Forum London 2019 Edition**

25th September 2019

Roundtables in the Mirror Room - First Day

An exchange of opinions, views and experiences made. Hear from experts and learn from peers.

These roundtables are held parallel to the plenary room's various insightful sessions and will allow attendees to join in-depth discussions around specific investment-related topics.

11:00 Blockchain as an Investment Opportunity

A short intro giving insights, followed by an exchange of views and opinions on challenges and how to apply great business cases

Moderator: **Antonio Pinedo Hoyvik**, Strategy Director, **Signe Group**

12:00 Investment: A Discussion on setting Long Term Objectives and Assessing Success

- What criteria do you use in choosing or reviewing an investment?
- Do you have a long term objective that meets the needs of all participants?
- Does the tried and trusted Aims, Beliefs and Constraints methodology to establish a multi-year or multi-decade journey plan, give the best framework to assess suitability and success?

Moderator: **David Clare**, Partner, **Barnett Waddingham LLP**

14:00 Brexit and Beyond: What does the Future hold for London's Property Market?

Moderators:

Alpa Bhakta, CEO, **Butterfield Mortgages**
David Gwyther, Director, **Butterfield Mortgages**

15:00 Forestland Investments - How To

Brief Case Study USA and an exchange between investor on the different ways to approach Forestland investments

Jeff Davis, Owner/Broker, Forestry Consultant

16:45 CleanTech as Investment Opportunity In Times of Climate Change

A short intro giving insights, followed by an exchange of views and opinions on challenges and how to apply great business cases

Giffen Ott, CleanTech Entrepreneur, Managing Director, **FullCycle**

17:15 Health as an Investment Theme: Spotlight Diagnostics

With Technology being a key driver for Innovation in MedTech, a case study on Diagnostics (where NanoTech, BioTech and A.I. merge) followed by an exchange of views and opinions on making MedTech Investments

Moderator: **Dr. Bharath Takulapalli**, Founder & CEO, **INanoBio Inc.**

26th September 2019

Roundtables in the Mirror Room - Second Day

An exchange of opinions, views and experiences made. Hear from experts and learn from peers.

These roundtables are held parallel to the plenary room's various insightful sessions and will allow attendees to join in-depth discussions around specific investment-related topics.

10:00 Practical Tips for Family Offices: Cyber Security - What to look out for

Moderators:

Jake Hockley, CEO, **Marclay Associates Ltd**
Kelly Smith, COO, **Marclay Associates Ltd**

11:30 UK Real Estate: Coping with the Latest Tax and Privacy Challenges

- Residential property: do you still own through a corporate?
- Can the new inheritance tax charge be mitigated?
- Can you avoid 15% stamp duty land tax? How do you cope with UK resident beneficiaries?
- Can you develop or "flip" property tax-free?
- The different holding structures of commercial and residential property now that capital gains tax applies

Emily Osborne, Partner, **Stephenson Harwood LLP**
Hugo Jenney, Partner, **Stephenson Harwood LLP**

14:00 Survive or Thrive? How to Set Up the Next Generation Family Members for Success

Join a 'get real' workshop (without revealing any personal details about yourself!) where you:

- Perform a self-assessment to identify specific areas where your family is inadequately prepared
- Learn the top ten things you need to do to set your family up for success
- Take home some very practical transformational tools for life which you can start using immediately

Moderator: **Simon Hodges**, Transformation Coach

15:00 Achieving Tax Free Returns on Business Sales

- Offshore trusts
- Linked investment companies
- Family investment companies
- Employee ownership trusts
- De-mergers

Moderator: **Craig Kemsley**, Partner, Head of Tax, **Calibrate Law**

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 £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.

Who is a Partner

Partners are industry leaders 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

Forum Partners



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Notes

Upcoming Editions Of The Family Office Forum Collection

[Register Now](#)


New York, 15th-16th October 2019

100+ North American UHNWI and Family Offices meet.



Zurich, 12th-13th November 2019

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



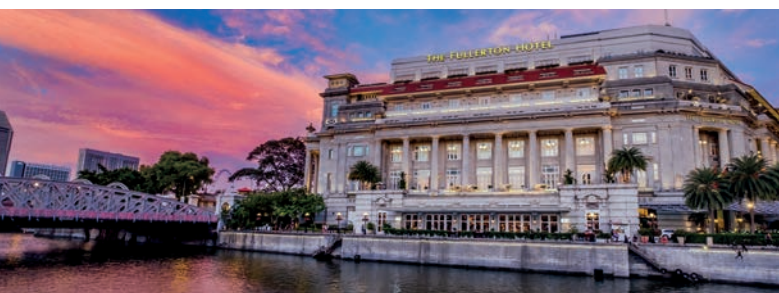
Dubai, 3rd-4th March 2020

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



Wiesbaden, 21st-22nd April 2020

Join us when 140+ genuine* German-speaking Family Offices meet.



Singapore, 4th-5th May 2020

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



London, 22nd-23rd September 2020

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

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

By phone: Please dial +44(0) 20 339 71390