

Draft

Check for Regular Updates

Join us when 140+ Family Offices and UHNWIs meet!

Prestel & Partner

Family Office Forum | Collection

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



Jonathan Warburton
Family Principal



Chiara Mediol
Family Principal



Tue Nyboe Andersen
Next-Gen Member



Selale Zaim Gorton
Next-Gen Member



Kenneth Winther
Family Principal



Nasser Al Shawaf
Family Principal



Sadeq Karam
Family Principal



Doris Sommavilla
Next-Gen Member



Joel Lu
Next-Gen Member



Future-Proof Your Family Office

Join us for a private forum where 140+ Family Offices and UHNWIs based in the UK and beyond meet, share their experience, and learn from each other.

- High family office and investor ratio - network with Family Offices and UHNWIs
- Topics for families by families – on Family Governance and Investment best practices
- All-day networking – meet prominent peers and have inspiring conversations
- Benefit from a bespoke and curated programme (see inside)
- We provide a neutral and private platform; you choose with whom you engage; we don't even share the attendee list

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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



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 140+ 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 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. You can mingle with whomever you wish, while we don't even share a delegate list.

“ 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

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Your advantage

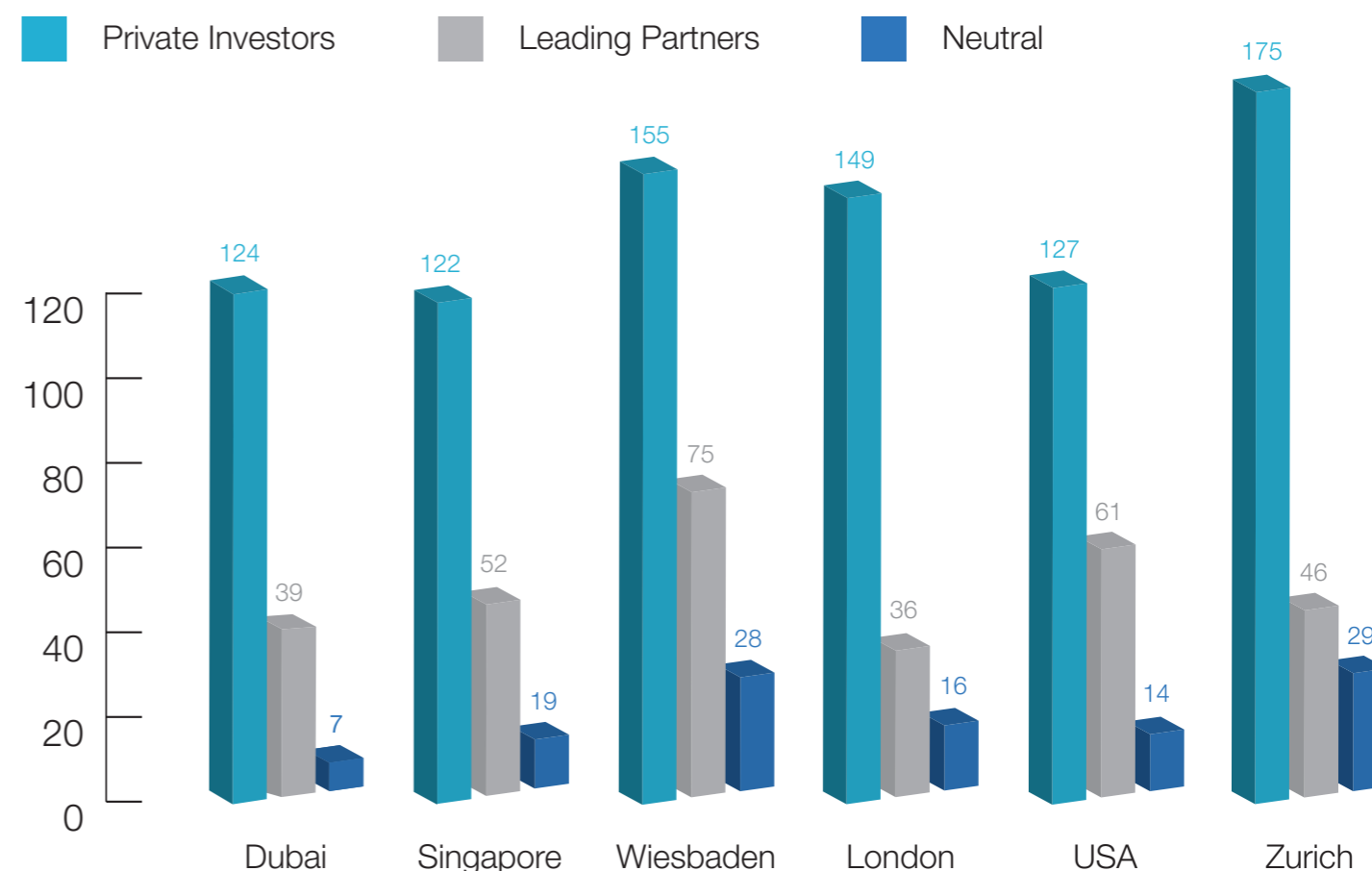
The audience: Our event is exclusively dedicated for Single Family Offices, Principals and Private Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or 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 140+ 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 small 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.

Family Office Forum

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

Ballroom, Claridge's: Presentations and panel discussions

Reception Room: 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
- 08:50 Family Office Forum Opening Remarks from Prestel & Partner
- 08:55 Welcome Address by Claridge's

Best Practice in Family Office Governance (Part One)

- 09:00 **The Power of Branding and Aligned Communication**
Jonathan Warburton, Chairman, Warburtons
- 09:45 **Family Legacy Continuation from Pre- to Post-Liquidity**
Chiara Medioli, Family Principal and Group Marketing Director, Fedrigoni
- 10:15 **Networking and Refreshments - Meet other Family Offices and UHNWIs**
- 10:45 **Focus on Stakeholder Engagement Arrangements – A Transition Case Study**
Selale Zaim Gorton, Next Generation Member, Inci Holding

Education 2.0

- 11:15 **How to Transfer Knowledge to the Next Gens: The Grand Italian Design – A Panel Discussion**
Using the power of intellectual capital and creativity for Family Offices
Four Italian Family Principals TBC
- 12:00 **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
- 12:30 **Lunch and Networking in the Ballroom Foyer - Meet other Family Offices and UHNWIs**

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Ballroom, Claridge's: Presentations and panel discussions

Reception Room: All-day networking with refreshments

Mirror Room: CIO roundtables – see pages 8-9

Day One Afternoon, Wednesday, 25th September 2019

Best Practice in Family Office Governance (Part Two)

- 14:00 **Transparency vs. Opacity in Family Enterprises**
Doris Sommovilla, Principal, Union Hotels Canazei and Sommovilla Costruzioni
Dominik von Eynern, Family Member, Partner, Blu Family Office
- 14:30 **The Transfer of Wealth to the Next Generations – A Panel Discussion**
James Stewart, Penningtons Manches
Nancy Chien, Bedell Cristin
Moderator: Simon Hodges, Entrepreneur
- 15:15 **Familial Decision Making: Intra and Inter-Generational Dynamics and Governance**
Family Office setup, liquidity events, and next gen considerations
Barclays
- 15:45 **Afternoon Networking and Refreshments - Meet other Family Offices and UHNWIs**
- 16:15 **Governance Sustainability: What Works and What Fails**
Most Family Businesses and family offices have Governance in place.... yet it fails.
Learn what is the key to creating a Governance model that empowers the family and shareholders.
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
- 17:15 **Networking Drinks Reception**

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Ballroom, Claridge's: **Presentations and panel discussions**

Reception Room: **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
 09:20 Family Office Forum Opening Address from Prestel & Partner

Achieving Great Returns while Making an Impact

- 09:30 Two Generations Tackling Impact
 Kenneth Winther & Son
- 10:00 Impact and Innovation – Success Tales from Africa
 Tue Nyboe Andersen

Ethical Investments

- 10:30 Networking and Refreshments - Meet other Family Offices and UHNWIs
- 11:00 Ethical Investments: How To – A Panel Discussion
 • AI
 • BioTech
- 11:45 Investing Into Life Sciences – A Panel Discussion
 • Artificial Intelligence
 • Health care
 Dr. Bharath Takulapalli, Founder & CEO, INanoBio Inc.
- 12:30 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
 Prof. Dr. Ewan Birney, Director, EMBL's European Bioinformatics Institute

Ballroom, Claridge's: **Presentations and panel discussions**

Reception Room: **All-day networking with refreshments**

Mirror Room: **CIO roundtables – see pages 8-9**

Day Two Afternoon, Thursday, 26th September 2019

Achieving Operational Efficiency for your Family Office

- 14:30 **Protecting Your Investment Capital - A Panel Discussion**
 • De-risking projects through bespoke innovative insurance
 • Unlocking complex potential through lateral due diligence
 • Asset recovery and mitigation strategies
 • Direct cases with practical takeaways
 Moderator: **Rupert Boswall**, Chairman, **RPC**
- 15:00 **Avoiding Issues while Managing Portfolio – A Panel Discussion**
 Emily Osborne, Partner, **Stephenson Harwood**
- 15:30 **Afternoon Networking and Refreshments - Meet other Family Offices and UHNWIs**
- 16:00 **Optimising Your Family Office Operations – A Panel Discussion**
 Including Cyber Risks and Security
- 16:30 **How Family Offices are Structured and How they should be Structured: Insights from Asia and the ME – A Panel Discussion**
 Session will focus on the significant need for internal restructuring of asset holdings to a focused core given the penchant for Asian billionaires to invest in a wide variety of Ventures.
Joel Lou, Co-Founder and Operating Partner, **BCV**
Tandip Singh, **Altrui**

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First Day - 25th September 2019

CIO roundtables in the Mirror Room

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.

A Know-How and Best Practice on Direct Deals

Co-Investments – Peers Exchanging their Views

Life Sciences, BioTech, Health Care – How to Invest

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.

Dr. Bharath Takulapalli, Founder & CEO, INanoBio Inc.

Impact Investments – Peers Involved Exchange their Experiences

Second Day - 26th September 2019

CIO roundtables in the Mirror Room

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.

Venture Capital – Considerations such as Control and Valuation

Real Estate – An Exchange of Views and Opinions

Blockchain – As a Practical Asset Class

Private Equity – Direct vs Fund Investments

Emerging Market Opportunities – How Do Your Peers Operate?

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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



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

140+ 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

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

Family Offices and UHNWI's 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

Family Office Forum

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

Reserve your place for the Family Office Forum London
25th-26th September 2019, Claridge's

Register Now

Free Admission for Family Offices

Are you a wealth owner, family principal or a C-suite executive of a genuine* Family Office?
You have the privilege of free admission. Please contact: tobias.prestel@prestelandpartner.com

For commercial multi family offices, advisors we offer a limited amount of tickets,
please book yours: ticket@prestelandpartner.com

For any sponsorship opportunities, please contact: office@prestelandpartner.com

Pass	Until 31.01.2019	01.02.2019 until 31.03.2019	01.04.2019 until 31.05.2019	From 01.06.2019	Number
Two Days: 25th-26th September 2019	£2490 + VAT	£2690 + VAT	£2890 + VAT	£3090 + VAT	
One Day: 25th or 26th September 2019	£1990 + VAT	£2190 + VAT	£2390 + VAT	£2590 + VAT	
			Total		

Registration fee includes refreshments, coffee breaks, snacks, buffet lunch, drinks and conference documentation. Accommodation and travel is not included. VAT subject to government change.

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

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.