

Family Office Forum | Collection

New York 2019 Edition - October 15th-16th, Harvard Club



Thriving via Values and Agility

Join 100+ Family Office* and UHNWI peers based in North America and beyond at our private forum.

You will also meet many multi-generational European families from our well-established international network.

- Benefit from high family office and investor ratio : network with Family Offices and UHNWIs
- Topics for families by families – both Family Governance and Investment best practices
- All-day networking – meet prominent peers and have inspiring conversations
- Bespoke, curated programme (see inside) - we are content-led; we don't take commissions from anyone
- 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.

Current and Previous US Forum Partners Include:



Family Office Forum

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We are delighted to invite* you to join the Family Office Forum New York 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 panel discussions with high number of Family Office Principals on stage, sharing their views
- In-depth round table discussions
- All-day networking, in addition to dedicated networking breaks, lunches, and drinks reception

About Us:

Prestel & Partner, with six well-established annual family office forum editions in Zurich, Dubai, Singapore, Wiesbaden, New York City, and London, is proud to be a global leader in providing private Family Office platforms for peer-to-peer 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 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

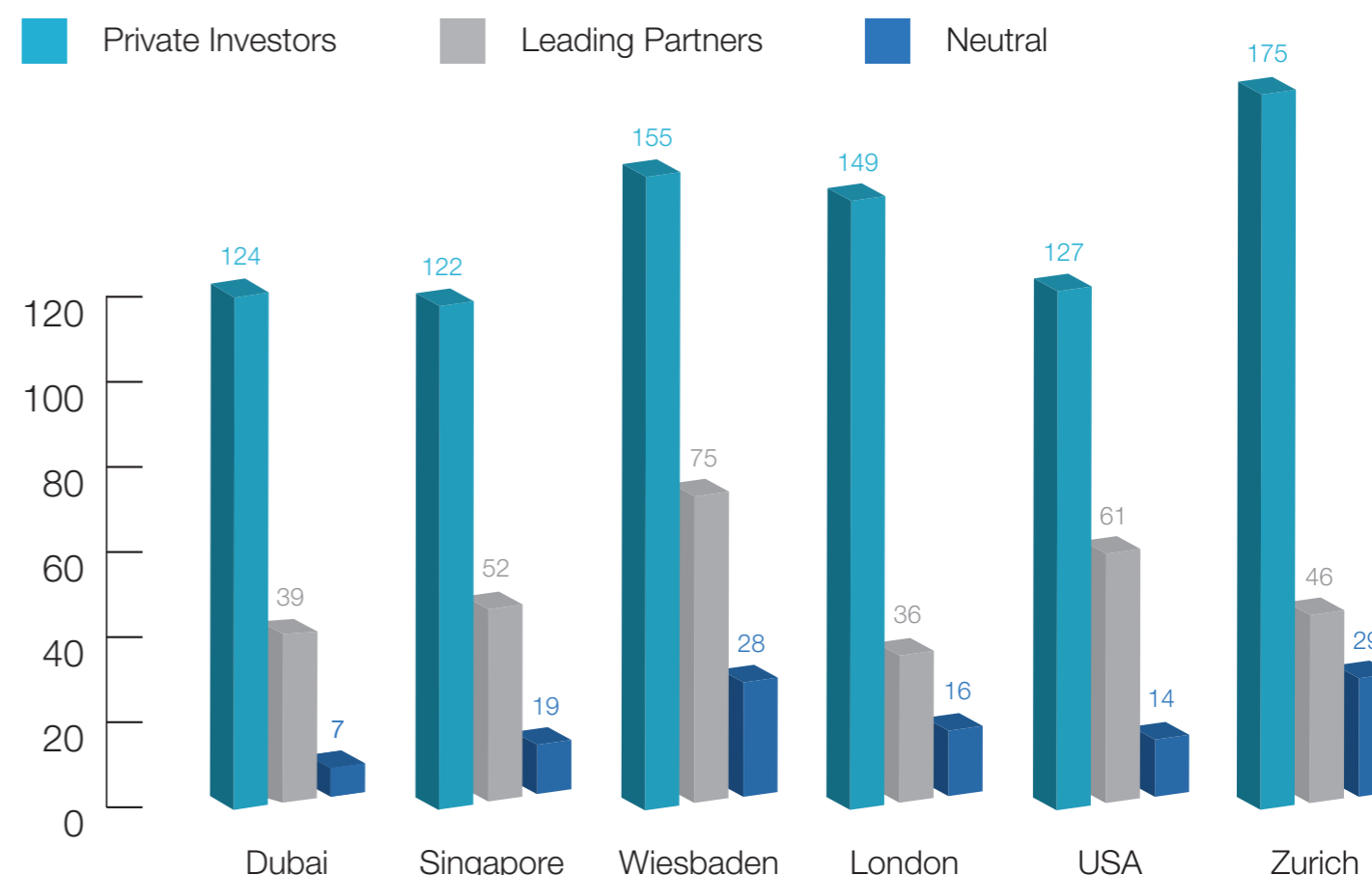
The audience: Our event is exclusively dedicated for Single Family Offices, Principals and Private Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or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

Harvard Hall: **Presentations and panel discussions**

Foyer: **All-day networking with refreshments**

Roundtable Room: **Investment roundtables**

Day One Morning, October 15th, 2019

8:30 am Registration and Networking Coffee

9:20 am Welcome and Introductions from Prestel & Partner

9:30 am Keynote on Inclusive Capitalism by Lady Lynn Forester de Rothschild

The Role of Technology and Innovation for Family Offices

10:30 am Keynote on Family Legacy by Uli Schmid-Maybach

11:00 am Morning Coffee and Refreshments - Meet other Family Offices and UHNWIs

11:30 am Next Gens and Tech Entrepreneurship – Is it Only “Play Money”? - A Panel Discussion
Katie Loeb, Next Gen Member, Loeb

12:15 pm **The Family Office of The Future with Genomics Consciousness**
Genetics has always played a critical role in the health and well-being of families, but with the escalating capacity to read, write, edit genomes and create new biology, genomics will permeate all aspects of family offices. Receive actionable guidance on immediate risk mitigation practices for long-term planning; especially, for succession, and next generation engagement.
Dr. Ronnie S. Stangler, Chief Health and Well-Being Officer, Private Single Family Office

12:45 pm Lunch and Networking - Meet other Family Offices and UHNWIs

1:45 pm Cyber and Personal Security for Family Offices and Private Investors
- Including Reputation Management

Harvard Hall: **Presentations and panel discussions**

Foyer: **All-day networking with refreshments**

Roundtable Room: **Investment roundtables**

Day One Afternoon, October 15th, 2019

Operations and Governance Insights

2:15 pm **Family Office Location Strategies: Family, Wealth, and the Next Generation – A Panel Discussion**
Brandon Laughren, Chief Investment Officer, The Laughren Group
Fabrizio Arengi Bentivoglio, Chairman, CEO, Fidia

3:00 pm How Geography Affects Competitiveness for the Family Entities and Longevity for the Family

3:30 pm Afternoon Refreshments - Meet other Family Offices and UHNWIs

4:15 pm Sustainable Family Entities - Grill on Costs; Monitoring and Reporting

5:00 pm Family Engagement and Conflict Management - Insights into Winning Formulas

5:30 pm Drinks Reception - Meet other Family Offices and UHNWIs

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Please Check for
Regular Updates

Harvard Hall: **Presentations and panel discussions**

Foyer: **All-day networking with refreshments**

Roundtable Room: **Investment roundtables**

Day Two Morning, October 16th, 2019

9:00 am Networking Coffee - Meet other Family Offices and UHNWIs

Changing Leadership – The Transfer of Capitals

9:30 am Current Leaders – The Force for Good and The Force for Growth

10:15 am Challenges and opportunities around growth, wealth transfer planning and wealth preservation

10:45 am Nurtured to Succeed – Succession Planning Fit for the Next Generation

11:15 am Morning Coffee and Refreshments - Meet other Family Offices and UHNWIs

12:45 pm Adapting to Changing Educational Needs for All Generations - A Panel Discussion
Geoff George, Family Member, Viewpoint Single Family Office

1:15 pm Lunch and Networking - Meet other Family Offices and UHNWIs

2:15 pm New Leaders at the Helm: Next Gens Making their Marks on the Future of Family Offices – A Panel Discussion

Harvard Hall: **Presentations and panel discussions**

Foyer: **All-day networking with refreshments**

Roundtable Room: **Investment roundtables**

Day Two Afternoon, October 16th, 2019

Managing Wealth with Purpose

3:00 pm **Environmental Capitalism**
Commercialising nature to solve problems and realise returns; Mistakes, challenges, downfalls, and pitfalls on the way to excellence
Jason Drew, CEO, AgriProtein

3:30 pm **Sustainability and Resilience of the World's Largest Industry: Agriculture**
Dr. Jerry Feitelson, CEO, Agribody Technologies

4:00 pm **Keynote Address: Profitable Returns Through Sustainable Farming**

- Elevating the poorest farmers' incomes through contract farming
- Using innovations to create high returns
- Creating tomorrow's food for profit today

Arvind Narula, Chairman & Founder, Urmatt Group

4:30 pm Afternoon Refreshments - Meet other Family Offices and UHNWIs

Special Feature: Private Peer-To-Peer Discussions

4:45 pm **Informal Roundtables: Two Parallel Sessions For Private In-Depth Conversations**

We will be running two separate roundtable sessions with a dedicated moderator belonging to the related peer group. The discussions will allow you to exchange views, opinions, and best practice, with an added benefit of fostering further bonds with your peers.

6:30 pm End of New York 2019 Edition Forum

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Please Check for
Regular Updates

Please note, that we are currently working on the forum programme, should you wish to be involved in the plenary sessions or in the round tables, please get in touch at office@prestelandpartner.com

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Please Check for Regular Updates

Investment Roundtables Will Include

Co-Investments – Keeping Family Matters Away

Direct Deals – Deal-Flow, Control, Ownership, Impact

The Changing Landscape of Real Estate Opportunities

Exploring and Understanding the Impact of Genomics for Family Offices

Developed Market Equities

The Universe of Opportunities around Blockchain

Allocating to Private Equity

The Value in the Venture Capital Universe

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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**

Current and Previous US Forum Partners Include:



Morgan Stanley



The Ultimate Driving Machine®

GUGGENHEIM



CHUBB®



GOLDEN EAGLE PARTNERS



ZEITGEIST



NEW MAPLE HOLDINGS

The Family Office Forum Collection

Upcoming Editions Of

Register Now



London, September 25th-26th 2019

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



Zurich, November 12th-13th 2019

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



Dubai, March 3rd-4th 2020

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



Wiesbaden, April 21st-22nd 2020

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



Singapore, May 4th-5th 2020

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



London, September 22nd-23rd 2020

100+ 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

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Registration



Reserve your place for the Family Office Forum New York
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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

Discounted Rooms at the Harvard Club

As a forum attendee, should you wish to book a Queen room at the rate of \$440 plus tax per night at the Harvard Club, please refer to "Family Office Forum" and email frontdeskgroup@hony.com or call 212-840-6600.

Please note that these room are upon the Harvard Club's availability and on a first come first serve basis.

Pass	Until May 31st 2019	June 1st 2019 until July 31st 2019	From August 1st 2019	Number
Two Days: October 15th-16th 2019	\$2990	\$3290	\$3490	
One Day: October 15th or 16th 2019	\$2290	\$2490	\$2890	
			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.

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