

"The conference was not only informative but enjoyable and an extremely friendly experience"

(Skillcorn, RBS Coutts)

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IBC PRESENTS THE 3RD ANNUAL:

FAMILY OFFICE FORUM

Features 10+
Speakers from Family
Offices for 2012

FAMILY OFFICE FORUM IN NUMBERS

20+ Leading Family Office Representatives & Advisors in One Interactive Day

10+ Leading Family Offices discussing the latest **Investment & Governance Strategies**

4 New Breakout Sessions including:

- Optimising Cost Structures for the Families Investments
- Beyond Europe – How do Family Offices work in Singapore?
- Family Offices in Impact Investing: the Intersection of Money and Meaning
- Understanding Investment Risk for the Family Business

The Family Office Forum is Free for Family Offices

for details or to register, please e-mail Jonathan.Olver@informa.com

FAMILY OFFICE REPRESENTATIVES



Hussam Otaibi
FLOREAT
FAMILY
OFFICE



William Drake
LORD
NORTH
STREET



Jonathan
Guest
APOLLO
FAMILY
OFFICE



Peter Gibson
DYNASTY
FAMILY
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Jeremy
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- Jonathan Bell, STANHOPE CAPITAL
- Michael von Stumm, KURT A ENGELHORN SFO
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FAMILY OFFICE ADVISORY PANEL



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OFFICES



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Tuesday 4th December, Swissotel, Zurich, Switzerland

REGISTER TODAY:

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For the Latest Programme & To Register: www.ibt-events.com/familyoffice

“Good variety of speakers who were knowledgeable about their areas and shared their experiences”
(Le Provost, Anson Group Limited)

FAMILY OFFICES

09:00 Registration & Coffee

09:25 Opening Remarks from Chair


Jonathan Lidster
GLOBAL PARTNERSHIP FAMILY OFFICES

09:30 **The Failure of the New Economics**

This informative session will explain what this failure means for owners of assets

Robert Hutchinson
HUTCHINSON LILLEY INVESTMENTS LTD

10:00 **Times of Change: Challenges Facing Family Offices Today**

- 
- Addressing the challenges brought about by outsourcing
 - The exodus from Europe – where to setup a new family office
 - Recognising the need to re-evaluate the family portfolio
 - Regulation – how is anti-avoidance affecting the family?

Moderated by:
Jeremy Arnold
KEDGE CAPITAL

Panel Members:
William Drake
LORD NORTH STREET

Jeremy Arnold
KEDGE CAPITAL

Louise Adams
ANTHOS LONDON*

Jonathan Guest
APOLLO FAMILY OFFICE

Gero M Bauknecht
BAUKNECHT-CAPITAL

10:50 Coffee & Networking

Interested in Speaking at the conference?

If you provide a service of interest to Family Offices and the wealth industry we can position you as a thought leader and provide you with a platform to present your offering to a targeted group of senior professionals.

Or perhaps you would like to exhibit a product or offering to raise awareness of your presence in this industry?

For more information please feel free to contact Russell Tumath:

Tel + 44 (0)20 3377 3278 Email: Russell.Tumath@informa.com

11:10

Demographics & Long term Investment



- FO anti inflation and tax being biggest burden
- Anti nationalization and expropriation
- Property & privacy rights
- Transparency
- Consistency of the law
- Currencies
- Strategies for wealth preservation
- Long range forecasts - is econometrics dead?
- Investing in small self controlled flexible units - maturity over flexibility

Moderated by:

Dr. Rainer von Echlin
BARON OF ECHLIN

Moritz Schildt
NORD IX AG

Benedict Götte
COMPASS CAPITAL

Jonathan Bell
STANHOPE CAPITAL

12:00

Session TBA

Representative from Northern Trust

12.40

Key Success Factors for Reliable Reporting

- Reconciling the needs of the Family and Family Office
- Delivering accurate information on time
- Managing multiple data providers
- Consolidating across complex structures

Ian Ledzion
AXIDIA

13:20

Lunch & Networking

* = under invitation

14:20 Choice of 2 Break Out Sessions

(Room 1)

Optimising Cost Structures in Investments

This session will provide practical knowledge on how families can ensure they are not paying over the odds with regards to fees. It will also analyse the best methods for monitoring competitiveness and achieving full transparency.

Wolfram Klingler
NOVARCA XTP GMBH

(Room 2)

Beyond Europe – How do Family Offices Work in Singapore?

- Family office overview of Singapore – UNWI population
- Which family office model is common?
- Tax and regulatory framework in Singapore
- Investment opportunities in the region and for the family business

Peter Gibson
DYNASTY FAMILY OFFICE

15:00 Coffee

15:20 Choice of 2 Break Out Sessions

(Room 1)

Family Offices in Impact Investing: the Intersection of Money and Meaning

- A review of the spectrum of impact investing/venture philanthropy activity
- Innovations for family offices keen to lead, as well as those happy to follow: case study on the Artha Platform
- The realm of 'impact products' and who offers what
- A glance at impact investing in emerging markets

Audrey Selian
RIANTA CAPITAL

(Room 2)

Understanding Investment Risk for the Family Business

- Developing the investment strategy
- Risk monitoring
- Reporting
- Taking in the expertise and views of the client
- Using the collective expertise and knowledge
- The requirements of a wealth manager

Michael Maslinski
MASLINSKI & CO LTD

16:10 **Asset Servicing for Family Offices**

- Human capital as an asset class
- Real estate
- External private equity investment
- Equity and liquid assets
- Art and luxury assets (yachts, jets etc.)

Hussam Otaibi
FLOREAT FAMILY OFFICE SERVICES AG

16:50

Practical Governance & Succession



- Generational changes: Interacting with the next generation
- Family conflicts
- Business diversification
- Diverse interest in culture of family leadership
- Can you afford to divorce?

Moderated by:
Alexandra Sharpe
PETER LEACH & PARTNERS

Clare Archer
PENNINGTONS

Michael von Stumm
KURT A ENGELHORN SFO

Further Panel Members from MFOs & SFOs

17:40

Close of Conference & Drinks Reception



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HOW MUCH?

Register by 12th October 2012	Register by 9th November 2012	Register after 9th November 2012
<input type="checkbox"/> Conference Only FKW52468 £799 (SAVE £200)	<input type="checkbox"/> Conference Only FKW52468 £899 (SAVE £100)	<input type="checkbox"/> Conference Only FKW52468 £999

FAMILY OFFICES & IN-HOUSE COUNSEL OF FAMILY BUSINESSES

Family Offices/In-house Counsel
FREE (Family Office/Business only - max 4 delegates).
Contact jonathan.olver@informa.com to register

50% discount for 3rd and subsequent delegates.

The VAT rate is subject to change and may differ from the advertised rate. The amount you are charged will be determined when your invoice is raised. Savings include Multiple Booking & Early Booking Discounts. All discounts are subject to approval. Please note the conference fee does not include travel or hotel accommodation costs. 50% Discount for 3rd and subsequent delegates. All discounts can only be claimed at the time of registration and multi-booking discounts cannot be combined with other discounts that may be available (apart from early booking discounts which are available to everyone). **We are happy to accept a replacement delegate for the whole event, however delegate passes cannot be split or shared between delegates under any circumstances.**

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WHEN AND WHERE

FKW52468

4th December 2012

Venue:

Swissotel Zurich, Schulstrasse 44, 8050 Zurich,
Switzerland, Tel: +41 44 317 3111, Fax: +41 44 317
3311, Email:zurich@swissotel.com

Delegates are responsible for the arrangement and payment of their own travel and accommodation.IIR has arranged a special room rate at a number of hotels. If you wish to book a room, please call Venue Search on +44 (0)20 8546 6166 stating that you are an IIR delegate.

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