

Family Business & Family Office



May 30 & 31 2006

**Kikuoka Golf Club
Luxembourg**

Family Workshop June 1st 2006

*Growing Future Family Leaders:
Challenges and Opportunities.
Using Philanthropy and Education
to Develop the Next Generation*

With the exceptional
participation of the following experts :

Day one - May 30

Chairman - Morning **Dr. Christian Jacobs**

Partner
WHITE & CASE, LLP
Chairman
JACOBS FOUNDATION

Simone Retter

Partner Corporate & Tax
ARENDT & MEDERNACH,
Luxembourg

Barbara von Gartzten

Managing Director
FAMILY ESTATE SERVICES S.A.,
Luxembourg

Carol Pepper

Member of the ESAFON Board
President
PEPPER INTERNATIONAL,
New York

Chairman - Afternoon

Claude Kremer

Partner
ARENDT & MEDERNACH,
Luxembourg

Michael Maslinski

Founding Partner
MASLINSKI & Co Ltd, London

Jean-François Lycops

Founding Partner
PRIVATE INSURER, Brussels

Barbara De Beurme

Director
PRIVATE INSURER, Brussels

Michelle St Jane

Barrister & Attorney/Notary Public
KAIROIS Philanthropy, Bermuda

Guy Wagner

Chief Economist
BANQUE DE LUXEMBOURG,
Luxembourg

Day two - May 31

Chairman

François Pauly

Chief Executive Officer
BANK SAL.OPPENHEIM JR. &
CIE. (LUXEMBOURG) S.A.,
Luxembourg

Thomas W. Meissner

Deputy Managing Director
OPPENHEIM
VERMOEGENSTREUHAND,
Germany

Peter Branner

Chief Investment Officer
IKANO, Luxembourg

Michael Hornsby

Partner Real Estate
ERNST & YOUNG, Luxembourg

Philippe Jouard

Global Head Dexia Private Banking
Member of the Executive Board
Dexia BIL
DEXIA BANQUE INTERNATIO
NALE A LUXEMBOURG,
Luxembourg

Marc der Kinderen

Founding Partner
747 CAPITAL LLC, New York

Scott Jones

Managing Partner
ORIGIN PARTNERS, New Jersey

Mark Powers

President
POWERS & DUBIN, New Jersey

Workshop - June 1st

Michelle St Jane

Barrister & Attorney/Notary Public
KAIROIS Philanthropy, Bermuda

Carol Pepper

Member of the ESAFON Board
President
PEPPER INTERNATIONAL,
New York

Organised by :

In partnership with :





Dear Executive,

The Luxembourg Parliament has introduced a new and favourable tax regime applicable since January 2006 that has abolished net wealth tax for both Luxembourg residents and non-residents.

Also, the introduction of a 10% final withholding tax instead of a marginal rate of 38.95% is a very beneficial development that high net worth individuals with significant assets should seriously look at when considering relocation for themselves and structuring alternatives to manage their wealth.

Therefore, more than ever, Luxembourg is a jurisdiction of choice for entrepreneurs, family businesses and family offices seeking a stable and favourable environment to manage their wealth. For those who are prepared to move, Luxembourg is not only a tax efficient place to live but also a well structured financial and banking platform served by highly competent advisers.

The conference will address the challenges that family members and family officers face in the management and inter-relationship of both family business and family wealth.

The conference is brought to you in partnership with ESAFON, the European Strategic Advisers and Family Office Network and GWF, the Global Wealthy Family Circle.

I look forward to meeting you in Luxembourg next May 30 & 31 2006.
Yours Sincerely,

François Golbery
Chief Executive Officer
MGI SWITZERLAND S.A

ESAFON

The European Strategic Advisors & Family Offices Network

Join the Association of the European Family Offices and their Best Global Strategic Wealth Management Advisors.

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To receive more information, please send an email
to Anne Golbery, Company Secretary, ESAFON
at : agolbery@mgi-direct.ch
or visit our web site : www.esafon.com

WHAT DELEGATES SAY ABOUT THE 23RD FAMILY BUSINESS & FAMILY OFFICE EVENT

- Very well selected panel
- I learned a lot
- Good content/technical into – about Luxembourg
- Well organized
- Outstanding speakers for appropriately selected topics
- Good update of what lives in our market
- Good balance of subjects
- An exceptional conference with a very high level of participants which is rather not typical in Luxembourg
- Very good speakers and topics

First Day

Tuesday May 30, 2006

08.30 Welcome Coffee and Registration

09.00 Opening Remarks by François Golbery & the Chairman

Dr. Christian Jacobs

Partner

WHITE & CASE, LLP

Chairman

JACOBS FOUNDATION

CHOOSING THE RIGHT SET-UP AND JURISDICTION

09.15 Structuring a Family Office: The lawyer's perspective

Dr. Christian Jacobs

Dr. Christian Jacobs is a partner of the law firm White & Case and Chairman of the Jacobs Foundation.

Prior to this, he was Chairman of Jacobs AG, the Swiss Holding Company of his family. During this time he refocused the company from investing in a variety of industries down to three core investments in Adecco SA (temporary global leader), Barry Callebaut AG (global leader in chocolate products) and the newly acquired Infront Sports & Media AG (ex Kirch Sports).

10.00 Relocation Opportunities in Luxembourg in Comparison with Other Jurisdictions

Simone Retter

Partner Corporate & Tax

ARENDT & MEDERNACH, Luxembourg

10.45 Coffee break

ISSUES FROM THE FAMILY'S PERSPECTIVE AND THEIR ADVISORS RELATED TO THE MANAGEMENT OF A FAMILY OFFICE

11.15 A Luxembourg Niche Approach to Family Office Services

Barbara von Gartzen

Managing Director

FAMILY ESTATE SERVICES S.A., Luxembourg

12.00 Top Ten Challenges faced by the Family Office today

Carol Pepper

Member of the ESAFON Board

President

PEPPER INTERNATIONAL, New York

12.45 Lunch

Chairman - Afternoon : Claude Kremer

14.00 Managing Boundaries between the Family and the Family Business

Michael Maslinski

Founding Partner

MASLINSKI & Co Ltd, London

14.45 Structuring Private Equity and Real Estate Investments through the SICAR Legislation in Luxembourg:

What are the advantages for HNWI and Families?

Claude Kremer

Partner

ARENDT & MEDERNACH, Luxembourg

15.30 Coffee break

16.00 Planning through Tailor-made Life Insurance Schemes

Jean-François Lycops

Director

PRIVATE INSURER, Brussels

Barbara De Beurme

Director

PRIVATE INSURER, Brussels

- 16.45 Living and Leaving a Legacy: A powerful intergenerational tool for optimizing families philanthropic strategy**
- Three Key areas to address in living and leaving a legacy
 - Communication - Facilitated by opportunities that offer each family member's voice to be heard
 - Philanthropic goals - Linked with life values, passions and cherished beliefs. Intergenerational philanthropic strategy energizes, exits and bonds family members
- Michelle St Jane**
Barrister & Attorney/Notary Public
KAİROS Philanthropy, Bermuda

- 17.30 The Effects of Globalisation and Growth Perspectives in Asia**
Guy Wagner
Chief Economist
BANQUE DE LUXEMBOURG, Luxembourg

18.15 Close of Day One

18.45 Coach departure to Chateau de Bourglinster

- 19.00 Cocktail and Dinner hosted by**
- 
- Chateau de Bourglinster**
"Luxembourg, an Attractive Jurisdiction for Wealthy Families"

Keynote Speaker:

Mr. Jeannot Krecké,
Minister of Economy and Foreign Trade
Grand Duchy of Luxembourg

Second Day

Wednesday May 31, 2006

- 08.30 Welcome Coffee and Registration**
- 09.00 Opening Remarks by the Chairman**
François Pauly
Chief Executive Officer
BANK SAL.OPPENHEIM JR. & CIE. (LUXEMBOURG) S.A.,
Luxembourg

STRUCTURING PROFESSIONAL RELATIONSHIPS WITH ADVISORS

- 09.15 Closing the Gap between Advisors' Interests and Clients**
Thomas W. Meissner
Deputy Managing Director
OPPENHEIM VERMOEGENSTREUHAND, Germany
- 10.00 Ensuring Flexible Investment & Risk Diversification for your Family Office**
Peter Branner
Chief Investment Officer
IKANO, Luxembourg
Peter Branner joined IKANO Fund Management S.A. in 1998 and was one of the driving forces in setting up the company and establishing IKANO Funds. IKANO was a part of IKEA until 1980. Today the IKANO group is organised in five business areas with an emphasis on financial services. The IKANO group is owned by the Kamprad Family.

10.45 Coffee break

INVESTMENT OPPORTUNITIES ACROSS ASSET CLASSES REAL ESTATE

- 11.15 The European Real Estate Market and Appropriate Unlisted Vehicles from an Investor's View Point**
Michael Hornsby
Partner Real Estate
ERNST & YOUNG, Luxembourg

PRIVATE EQUITY – VENTURE CAPITAL

12.00 The Role of the Bank

Philippe Jouard

Global Head Dexia Private Banking
Member of the Executive Board Dexia BIL
DEXIA BANQUE INTERNATIONALE A LUXEMBOURG,
Luxembourg

12.45 Lunch hosted by



14.00 What are the Aspects of Investing in US Family Businesses and Private Equity Funds of Funds that European Investors Need to Take Into Account?

Marc der Kinderen

Founding Partner
747 CAPITAL LLC, New York

14.30 Early Stage Venture Capital – Selecting Successful Opportunities in IT & Communications

Scott Jones

Managing Partner
ORIGIN PARTNERS, New Jersey

15.15 Coffee break

HEDGE FUNDS

15.45 Selecting Hedge Fund Investments: Some guidelines that families should consider

Mark Powers

President
POWERS & DUBIN, New Jersey

16.30 Close of the Conference

17.00 Cocktail hosted by



Family Workshop

Thursday June 1st, 2006

08.30 Welcome and Registration

GROWING FUTURE FAMILY LEADERS: CHALLENGES AND OPPORTUNITIES USING PHILANTHROPY AND EDUCATION TO DEVELOP THE NEXT GENERATION

- 09.00**
- Hold hands and make plans through family meetings & family retreats
 - Inspiring the next generation
 - Creating a family strategy for inspired philanthropy

Michelle St Jane

Barrister & Attorney/Notary Public
KAİROS Philanthropy, Bermuda

10.30 Coffee Break

- 11.00**
- How to Handle These Above Concepts in a Family Office Environment
 - Practical Tools and Suggestions for Implementation

Carol Pepper

President
PEPPER INTERNATIONAL, USA

12.30 Closing Cocktail for the families hosted by



How to register

- ☐ By Phone : + 41 22 319 69 00
- ☐ By Fax : + 41 22 319 69 01
- ☐ By Mail : MGI (SUISSE) SA
4 Bd James Fazy - CH-1201 Genève - Suisse
- ☐ By Internet : www.mgi-direct.ch
- ☐ By E-mail : customer.service@mgi-direct.ch

Date and venue

Conference - May 30 & 31 2006 (code C0614)
Kikuoka Golf Club - Schierhaff – 5412 Canach - Luxembourg

Accommodation

As a MGI Club Member, staying at the Kikuoka Golf Hotel, you and your spouse can benefit from special rates for your room and the beautiful Golf Course of 18 holes during the conference and the weekend.

You can also enjoy the facilities of the Hotel, as Fitness Centre and indoor Swimming Pool, for free. Please call our Registration Desk on 41 22 319 69 00 for further details.

Fee

- The fee for the conference includes refreshments, lunch, cocktail, dinner and a CD-ROM of the presentations

- A 15% discount (not cumulative with other discounts) is granted for any early registration and payment before April 15, 2006

- A 30% discount is granted to the second and any additional registration from the same institution at the same address

- A special rate for the conference and the workshop is granted to the Family Members and Single Family Offices:
Euros: 990; £: 690; CHF: 1'500; US\$: 1'250

Payment

☐ **By bank transfer** : payable to MGI Management Global Information SA

Luxembourg : Banque de Luxembourg

55 rue des Scillas - 12529 Howald

Euro Account : IBAN LU35 0080 9452 7700 1003

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Switzerland : BCV CP270, 1001 - Lausanne,

CHF Account : IBAN CH31 0076 7001 L500 1730 1

US \$ Account : IBAN CH72 0076 7001 S504 2329 9

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☐ **By cheque** : payable to MGI Management Global Information SA.

Please quote the conference code C0614 on the back of the cheque

Cancellation policy

Cancellation up to one month by writing before the conference will support an administrative charge of 10% of the fee. Prior to the one month the full fee is due but a substitute delegate may attend in your place if required.

MGI Commitment

This programme has been specially designed in compliance with the quality criteria set by MGI. The topics covered are issued from our research and the panel of speakers has been carefully selected on the basis of their credentials and relevant experience. Therefore, this programme is the sole property of MGI SA and cannot be copied under any circumstances.

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INVITATION TO THE FAMILY WORKSHOP ON BEHALF OF



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Registration Service
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- ☐ Yes, I wish to register to the 4th Annual Family Business & Family Office Conference (C0614) for the price of: Euros 2'250; CHF 3'450; US\$ 2'750
- ☐ Yes, I wish to register to the Workshop (W0614) for the price of : Euro: 500; CHF: 780; US\$: 620
- ☐ Yes, I wish to register to the conference and the workshop (CW0614) for the price of: Euros: 2'500; CHF 3'850; US\$ 2'990

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Job Title :

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Payment upon reception of the invoice will guarantee access to conference.

Date :

Signature :

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MGI SA with more than 8000 loyal customers organises highly focus and in-depth conferences addressing emerging trends and burning issues to the Wealth Management & Fund Industry within a Global perspective.