

The 9th Annual Conference

Global Family Office

December 10 & 11, 2009

SwissRe Centre for Global Dialogue – Zurich

First Day

Philip Manduca
Head of Investment
THE ECU GROUP PLC, London

PANEL SESSION

*How do FOs Change Their
Asset Allocation in Reflection
to Last Year Crisis?*

Moderator:

Gero M. Bauknecht
President
BAUKNECHT CAPITAL AG,
Glarus

Panelists:

Carol Pepper USA
CEO & Founder
PEPPER INTERNATIONAL,
New York

Eastern Europe

Ingo Dietrich
Chief Investment Officer
MARCUARD HERITAGE
FAMILY OFFICE, Zurich
Western Europe

Prof. Dr. rer. pol. Wolfgang Gerke
President
BAYERISCHE FINANZ ZENTRUM
(BFZ) e.V., Munich Brazil

Peer Buerguin
Founding Partner
PROLIFICO INVESTMENT LTD,
Brazil
Speaker to be designated Asia

Ajit Dayal
CEO & CIO
QUANTUM ADVISORS PRIVATE
LIMITED, Mumbai

Stephen Kuhn
Managing Partner
VINUM CAPITAL MANAGEMENT
LLC, San Anselmo

Laurent Favre
Partner
ALTERNATIVESOFT, London

PANEL SESSION

*Renewable Energy & Health Care
as Asset Classes Going Forward*

Moderator:

Dr. Eduardo Schindler
Founder & CEO
2thePoint AG, Zurich

Panelist:

David A. Fisher
Chairman
INNOVA CAPITAL, Aventura,
Florida

Second Day

Chairman:

Dr. Peter Spinnler
Chairman of the Trustee Board
ANIMATO FOUNDATION,
Zurich

Prof. Georg von Schnurbein
Head of the Centre for
Philanthropic Studies CEPS
Associate Professor
UNIVERSITY OF BASEL

Etienne Eichenberger
WISE, Geneva

PANEL SESSION

*Prerequisites to and Governance of the
Management of a Philanthropic Foundation*

Moderator:

Dr. Peter Spinnler
Chairman of the Trustee Board
ANIMATO FOUNDATION,
Zurich

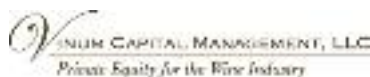
Panelist:

Beate Eckardt
Secretary General
SWISS FOUNDATIONS, Zurich



Organised by :

In Partnership with :



If you want to receive the programmes of MGI conferences and register :
please visit our website www.mgi-direct.com and www.mgi-china.com or contact our customer service tel. : + 41 22 319 69 00
E-mail : customer.service@mgi-direct.ch

The 9th Annual Conference GLOBAL FAMILY OFFICE



Dear Executive,

The 9th Annual Global Family Office Conference is this year set on the Zurich Lake with a new and appropriate venue to stimulate the exchange of information and ideas amongst participants at a time where worldwide family offices do have accumulated enough experience to report on the effects of the financial crisis on the management of their office.

The 9th Annual Global Family Office Conference will address the most pressing issues that family offices do have on their agendas going forward:

Protecting Family Wealth Going Forward

- Key Consideration to Portfolio Construction Going Forward
- How do FO's change their asset allocation in reflection of last year crisis?
- Do FO's change their advisors? Will more investment decision be in sourced or out sourced?
- Global Macro-Economic Outlook – The world in 2010 – Will the recovery be sustainable?
- How to protect your wealth – a focus on hard assets versus equities and fixed income
- Hedging against Inflation – Will the greater threat be inflation or deflation? Stagflation?
- Is this relevant for the USD only? How about the Euro? CHF? Asian currencies?
- Optimising investment opportunities between Europe, the US and Asia
- Will emerging countries play an increasing role?
- Is the decoupling story unfolding?
- The Balance of Power between LP's and GP's – Redefining the Role of Family Office?
- Reviewing the Value of Structured Products/HF in Overall Portfolio Construction
- Will Hedge Funds still be a part of asset allocation? How and how big?
- Infrastructure Asset Allocation and Investment Strategy & Opportunities for 2010 and beyond
- Where is the Alternative Energy Sector Heading?

Achieving Global Protection & Privacy

- Assessing Family Office Structural Risk
- How to Prepare for a High Tax Environment?
- What is the Value of "Co-operative Compliance" in Cross-border Tax Matters
- Financial Privacy & Confidentiality – What is Left Untouched – If any? In Switzerland and Key Financial Centres
- Tax Compliant Structuring for private clients and families in an era of fiscal transparency. From off to onshore
- How did the crisis affect personal well-being of the family members?
- Did the relationship /communication/trust between the office and the family members change?

Family Philanthropy & Family Foundation

- The Role of Business Leaders and Their Family Foundations in the Development of Civil Society
- The Challenges of Family Foundations – How to Manage the Family Member's Role over Generations
- Round-table: Practical Experience of Managing Family Foundations – What is Family Philanthropy? Vision-Mission-Goals - The Philanthropic Curve
- How to Get your Family Foundation Off the Ground
- Update on Legal and Tax Framework – Key Criterion to the Set-up of a Family Foundation including Choice of Location

We look forward to welcome you at the SwissRe Centre for Global Dialogue on December 10 & 11, 2009

Yours Sincerely,

François Golbery
Chief Executive Officer
MGI Suisse S.A.

ESAFON

The Global Family Offices & Strategic Advisors Network

Join the Association of the Family Offices and the Strategic Advisors.

- Develop Key Professional Contacts
 - Network with Major International Leaders
 - Be part of the ESAFON Directory
 - Benefit from a 60% Discount on your MGI Conference Fees
- To receive full details, please send an email to **Anne Golbery** at agolbery@mgi-direct.ch

First Day

Thursday, December 10, 2009

KEY CONSIDERATIONS TO THE MANAGEMENT OF FAMILY FINANCIAL ASSETS IN 2009- 2010

8.30am **Welcome Coffee and Registration**

9.15am **Welcome Opening Remarks by François Golbery and the Chairman**

9.30am **The Global Macro-Economic Outlook – The world in 2010**

- How to protect your wealth – a focus on hard assets versus equities and fixed income
- Will the greater threat be inflation or deflation?
- Socio-Economic problems arising out of greater protectionism
- A country focus – optimising investment opportunities between Europe, the US and Asia

Philip Manduca

Head of Investment

THE ECU GROUP PLC, London

10.15am **Coffe Break**

PANEL SESSION

10.45am **How do FOs Change Their Asset Allocation in Reflection to Last Year Crisis?**

- Will HF/PE/RE still be part of it? If yes, how and how big?
- Do FOs change their advisors or do they maintain their relationship?
- Will more decision/investments be insourced or outsourced? What might be a reason for that?
- How do they ensure the safekeeping of their assets?
- What other lessons have been learned?
- Will emerging countries play an increasing role?

Moderator:

Gero M. Bauknecht

President

BAUKNECHT CAPITAL AG, Glarus

Panelists:

USA

Carol Pepper

CEO & Founder

PEPPER INTERNATIONAL, New York

Eastern Europe

Ingo Dietrich (asked)

Chief Investment Officer

MARCUARD HERITAGE FAMILY OFFICE, Zurich

Western Europe

Prof. Dr. rer. pol. Wolfgang Gerke (asked)

President

BAYERISCHE FINANZ ZENTRUM(BFZ) e.V., Munich

Brazil

Peer Buerquin (asked)

Founding Partner

PROLIFICO INVESTMENT LTD, Brazil

Asia

Speaker to be designated

12.15pm **Lunch hosted by**

CROSS-CONTINENTAL OVERVIEW

- 2.30pm **Is The Decoupling Story Unfolding?**
Ajit Dayal
CEO & CIO
QUANTUM ADVISORS PRIVATE LIMITED, Mumbai
- 3.00pm **How to Deal Globally with The Credit Markets in The Current Situation and Forthcoming Environment**
(Speaker to be announced)
- 3.30pm **Coffe Break**
- HOW TO DEAL WITH ALTERNATIVE ASSETS**
- 4.00pm **The Importance of Keeping a Current and Agreed-upon Valuation of The Family Business**
Dr. Eduardo Schindler
Founder & CEO
2thePoint AG, Zurich
- 4.30pm **Private Equity & Business Succession in the Winery Industry: Is Wine a Safe Haven Asset Recession Resistant?**
Stephen Kuhn
Managing Partner
VINUM CAPITAL MANAGEMENT LLC, San Anselmo
- 5.00pm **Where is the Value Added in Adding Hedge Funds in a Family Office Portfolio?**
Laurent Favre
Partner
ALTERNATIVESOFT, London

PANEL SESSION

- 5.30pm **Renewable Energies - Too Late or Too Early to Join?**

Moderator:

Dr. Eduardo Schindler
Founder & CEO
2thePoint AG, Zurich

Panelist: (names to be designated)

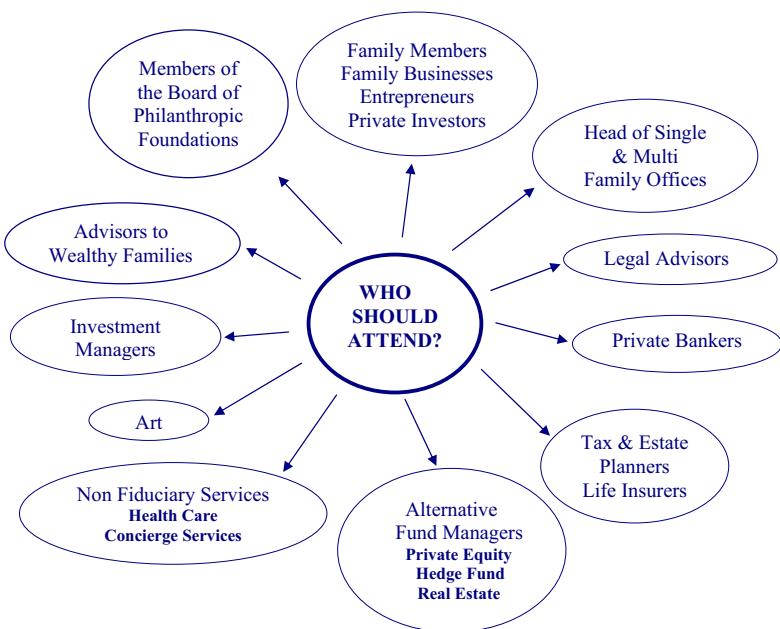
David A. Fisher
Chairman
INNOVA CAPITAL, Aventura, Florida

- 6.45pm **Closing Remarks of the Chairman**

- 7.00pm **Cocktail hosted by**



MGI Family Office Conferences Who Should Attend?



Second Day

Friday, December 11, 2009

THE SET-UP AND MANAGEMENT OF PHILANTHROPIC FOUNDATIONS

- 08.30am **Welcome Coffee and Registration**
- 09.15am **Welcome Opening Remarks by François Golbery and the Chairman**
Dr. Peter Spinnler
Chairman of the Trustee Board
ANIMATO FOUNDATION, Zurich
- 09.30am **Understanding the Magnitude of the Swiss Non-profit Sector & the Role of Philanthropy in Civil Society**
Prof. Georg von Schnurbein
Head of the Centre for Philanthropic Studies CEPS
Associate Professor
UNIVERSITY OF BASEL
- 10.15am **Prerequisites to and Governance of the Management of a Philanthropic Foundation**
Etienne Eichenberger (to be confirmed)
WISE, Geneva
- 11.00am **Coffee-Break**
- PANEL SESSION**
- 11.30pm **How and Why Philanthropic Foundation are Created? The Role of Business Leaders –How to Define a Foundation's Goal and Sustainable Philanthropic Objectives?**
Moderator:
Dr. Peter Spinnler
Chairman of the Trustee Board
ANIMATO FOUNDATION, Zurich
Panelist: (names to be designated)
Beate Eckardt
Secretary General
SWISS FOUNDATIONS, Zurich
- A business leader who has established a philanthropic foundation
 - A chairman of the trustee Board of a big and established foundation
 - A CEO of a well known philanthropic foundation
 - A representative of the advising associations/supporting
- 1.00pm **Closing Remarks by the Chairman**
- 1.15pm **Close of the Conference**

REFERRAL

jeudi, 27. août 2009 04:28

À : François Golbery

Objet : Re: The 9th Annual Global Family Office Conference - December 10 & 11, 2009 - Swiss Re Centre - Zürich

Mr. Golbery,

I have heard from several prominent members of the industry that your conferences on family office are some of the best. I commend your hard work and I would love to hear more about the upcoming event in December.

Would you kindly forward to me any material that would help me prioritize my travel and influence my colleagues?

I look forward to learning more and I look forward to meeting you. Congratulations on your stellar reputation.

Cheers,

Rick Higgins | Founder, Chief Innovation Officer

WealthTouch, Inc



The 9th Annual Conference Global Family Office

December 10 & 11, 2009 – SwissRe Centre for Global Dialogue – Zurich

C0918-1

PLEASE DO NOT DELETE THE ADDRESS UNDERNEATH

How to register

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

Date and venue

Conference December 10 & 11, 2009 (C0918)
 SwissRe Centre for Global Dialogue
 Gheistrasse 37 - 8803 Rüschlikon (Zurich)
 Switzerland



Accommodation

MGI has negotiated preferential rates with SwissRe Centre for Global Dialogue for your room. Please call our Registration Desk on 41 22 319 69 00 as soon as possible to book your room.

Fee

The fee for the conference including refreshments, luncheon, cocktail, and a CD-ROM of the presentations is: **CHF 3'350 (+VAT 7.6%)**

- A discount of 15% is granted for any early registration and payment from August 15, 2009 to September 1, 2009
- A discount of 30% is granted for MGI Club Members
- A discount of 40% is granted to the second and any additional registration from the same institution at the same address
- A discount of 60% is granted to ESAFON Members
(Please notice the discounts are not cumulative with other discounts)

Payment

- ☐ **BY BANK TRANSFER:**
 Account Holder : MGI Management Global Information SA
☐ **Payment in CHF :**
 • Bank : Credit Suisse - CP100 - CH Zürich - N° 0251-362955-41
 IBAN : CH72 0483 5036 2955 4100 0
 SWIFT : CRESCHZ12A
☐ **Payment in Euros :**
 • Bank : Banque de Luxembourg - L 12529 Howald Luxembourg
 IBAN : LU35 0080 9452 7700 1003
 SWIFT : BLUXLULLXXX - Account n° : 0945277/001.003
☐ **Payment in US\$:**
 • Bank : Banque de Luxembourg - L 12529 Howald Luxembourg
 IBAN : LU66 0080 9452 7700 3840
 SWIFT : BLUXLULLXXX

Please quote the conference "Global Family Office" code C0918

- ☐ **BY CHEQUE:**
 payable to MGI Management Global Information SA.
 Please quote the conference code C0918 on the back of the cheque

- ☐ **BY CREDIT CARD:** (Please note + 5% extra charges)

Please debit my: ☐ VISA

☐ MASTERCARD

Card N°

CCV N° Expiry Date

Signature:

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.

HOW TO REGISTER



By Internet
 www.mgi-direct.com
 By E-mail
 customer.service@mgi-direct.ch



By Fax
 within the EU :
 +41 22 319 69 01
 (011) from USA



By Phone
 Registration Service
 +41 22 319 69 00
 (011) from USA



MGI (SUISSE) SA
 4, Bld James Fazy
 CH-1201 Genève Suisse

- ☐ Yes, I wish to register to the 9th Annual "Global Family Office" Conference (C0918) for the price of: CHF 3'350 (+VAT 7.6%).
- ☐ Yes, I wish to register as ☐ a Family Member, ☐ Family Owned Business, ☐ Private Investor, ☐ Limited Partner or ☐ Single Family Office to the 9th Annual "Global Family Office" Conference (C0918) for the price of: CHF 1'675 (+VAT 7.6%) (please tick your profile)
- ☐ Yes, I wish to subscribe to ESAFON, the Global Family Offices & Strategic Advisors Network

Mr. / Mrs. / Ms. :

First Name :

Job Title :

Company :

Phone. (direct) : Fax (direct) :

E-mail :

Street / P.O. Box :

Postal Code : City :

Phone. (standard) : Fax (standard) :

Invoice to be addressed to :

VAT Number :

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

Date : Signature :



"Your Global Financial Information Partner"

MGI has access to and ongoing privileged relationship with best talented global leaders and experts to forge strategic partnerships and design highly focused conferences based on the most relevant issues. MGI contributes to the dissemination of knowledge and know how where it is the most needed and in areas that will influence the future of the wealth management at large.