EUROPEAN FAMILY OFFICE WINTER SYMPOSIUM

FEBRUARY 8-9, 2016

LONDON HILTON ON PARK LANE HOTEL, LONDON, UK

Opal Group

A SPECIAL THANKS TO OUR KEYNOTE SPEAKERS
TY Danjuma Family Office Ltd
City Noble Limited

A SPECIAL THANKS TO OUR ADVISORY BOARD:
LALCAP LTD (UK)
Saint Leonard (SFO)
Ritossa Olive Oil & Family Office (SFO)

A SPECIAL THANKS TO OUR PARTNER:
Peers, The Private Wealth Network

A SPECIAL THANK YOU TO OUR PARTICPATING MANAGERS:

AFLG Investments Private Equity
Apex Capital Introduction Services
Ayaltis AG
Blue Elephant
Capital Dynamics
Chorus Capital
CIM Banque
ColonyCapital, LLC
Cullen Funds PLC
Eaglewood Europe LLP

Elara India Gateway Fund
Gulfstream Investments
IWC Investment Partners
Mulvaney Capital
Oriens Investment Management
Santa Lucia Asset Management Pte Ltd
Siguler Guff
Sapiance Capital Limited
Stenham Advisors Plc
UBS
Valgreen Advisors, Ltd

8 FEBRUARY 2016

7:30 **EXHIBIT SET UP**

9:00-10:00 **REGISTRATION & CONTINENTAL BREAKFAST**
Sponsored By: Apex Capital Introduction Services

9:00-9:45 FAMILY OFFICE STRUCTURING WORKSHOP

Facilitators:
AH Loder Advisers
***family*dr**
Mack International, LLC

9:45 REMARKS BY OUR CHAIRMAN:
CEO, **Saint Leonard (SFO)**

9:45-10:05 CENTRAL EUROPE: WHY IS IT HOT AGAIN?

Founder & Managing Director, **Oriens Investment Management**

10:05-10:30 FAMILY ADVISERS: SPOTTING DYADIC RELATIONSHIPS AND OTHER DANGERS

There is little research into risks embedded into advisory relationships (wealth managers, accountants, lawyers, confidants …) for UHNW families and family offices. There have been countless cases of advisor fraud resulting in troubled family dynamics. How do we prevent and identify risks of fraud or abuse of trust? We will talk about dyadic relationships, isolation and denial through a series of case studies.

CEO, **TY Danjuma Family Office Ltd**

10:30-10:50 CAN TECHNOLOGY AND BANKING REGULATION CREATE NEW INVESTMENT OPPORTUNITIES FOR FAMILY OFFICES?

CEO, **Eaglewood Europe LLP**

10:50-11:50 **1 ON 1 MEETINGS & NETWORKING BREAK**

11:50-12:35 STRATEGIC INVESTMENT STYLES: What are the best options for a family office portfolio?

Moderator:
CEO, **Saint Leonard (SFO)**

Panellist:
CIO, **Wermuth Family Office**
CEO & Founder, **Sparrows Capital (MFO)**
Chairman, **Ritossa Olive Oil & Family Office (SFO)**
Vice Chairman, **UBS Global Family Office Group**

12:35-14:00 **WELCOME LUNCH**

14:00-14:35 LIQUID OPPORTUNITIES FUND SHOWCASE

Brought to you by Apex Capital Introduction Services

Managing Director, **King William Street Capital**
Partner, **Quotidian Investments**
Director, **Macromoney**

14:35-15:10 HYBRID ALTERNATIVES FUND SHOWCASE

Brought to you by Apex Capital Introduction Services

Managing Director, **LendInvest Capital**
CEO, **Kilcullen Investment Management**

CEO, **Montreaux CM**

15:10-15:55 CAPITALIZING ON REAL ASSET TRENDS

- In a zero interest world only real assets provide returns
- What is the best way of achieving this?
- Which assets?
- What are the specific risks?
- Renewable energy

Moderator:
Managing Partner, **MdF Family Partners**

Panellists:
Managing Director and Head of Clean Energy and Infrastructure - Europe, **Capital Dynamics**
Managing Partner, **J. Stern & Co. (MFO)**
President & CEO, **AFLG Investments Private Equity**

15:55-16:15 STRATEGIC OVERVIEW: HOW ARE THE MOST DYNAMIC INVESTORS POSITIONED?

Chief Risk Officer, **Ayaltis AG**

16:15-17:45 **1 ON 1 MEETINGS & NETWORKING BREAK**

17:45-18:30 MEASURING YOUR IMPACT: INVESTING IN CHANGE

- Impact measurement
- How does impact investing and philanthropy go hand in hand?
- Family office experiences: Moving towards an impact portfolio
- Impact investing: Quo Vadis?

Moderator:
MD, Managing Director, **Rhodanus Capital**

Panellist:
Investments & Strategy Manager, **Ceniarth (SFO)**
Head of SRII, Head of Family Governance, **Sandaire (MFO)**
Founder, **PVA Advisory GmbH**
Partner, **Steward Redqueen**

18:30-19:30 **NETWORKING COCKTAIL RECEPTION**

9 FEBRUARY 2016

8:00 **CONTINENTAL BREAKFAST**
Sponsored by: Oriens Investment Management

8:00- 9:00	COMMON THEMES OF NEXTGENS ROUNDTABLE

- Marriage, Addiction, Education, Entrepreneurship, Entitlement

NO MANAGERS WILL BE ALLOWED IN THE SESSION, NO EXCEPTIONS.

Facilitator:
President and Founder, **Mack International, LLC**
Managing Partner, **FAMILIAS & COMPANY**

9:00 REMARKS BY OUR CHAIRMAN
Director, **LALCAP LTD (UK)**

9:00-10:00 PHILANTHROPIC ENDEAVORS: WHAT'S YOUR LEGACY?

- There are so many deserving causes, how do you decide who to donate to?
- How do you monitor that your aims are being met?
- Changing lives: challenges of end recipients benefitting
- Anecdotal stories of successes and failures

Moderator:
Director, **LALCAP LTD (UK)**

Panellist:
Managing Director, **Alea Global Group – Kuwait**
Chief Executive Officer, **National Philanthropic Trust UK**
Chief Executive, **Commonwealth Education Trust**
CEO, **The Social Investment Consultancy**

10:00-11:30 **1 ON 1 MEETINGS & NETWORKING BREAK**

11:30-12:15 FIXED INCOME & EQUITIES

- Do the benefits outweigh liquidity?
- Volatile markets and long term investments

Moderator:
CIO, **CBM Investment Management (MFO)**

Panellists:
Partner, **Valgreen Advisors, Ltd**
Director, **Meketa Investments London**
Chariman, **INDORUS Holdings LLP (SFO)**

12:15-13:00 BEYOND TRADITIONAL PRIVATE EQUITY

- Growth equity
- Private credit
- Real estate

Moderator:
CEO, **Shepperd Investors AG (SFO)**

Panellist:
Managing Director, Private Client Practice, **Cambridge Associates**
Founder & Managing Director, **Oriens Investment Management**
Managing Director, **ColonyCapital, LLC**

13:00-14:15 **LUNCHEON & KEYNOTE SPEAKER**

BEHAVIOURAL FINANCE: THE MISSING LINK BETWEEN ECONOMICS AND INVESTMENT

The human brain is hardwired for good evolutionary reasons to use ‘System 1’ thinking (fast, intuitive, unconscious) in preference to ‘System 2’ (slow, cognitive, conscious), sometimes leading to biases, mental short-cuts and irrationality. Indeed, psychologists estimate there are over 150 biases and mental short cuts that pervade all aspects of our decision-making processes and memory. With 28 years experience in finance, Paul Craven, formerly of Goldman Sachs and now a behavioural specialist with City Noble Limited, will provide an interactive talk on what can we do about our and our clients’ investment biases.

Director, **City Noble Limited**

14:15-15:15 EMERGING MANAGERS: OUT PERFORMING THEIR LARGER PEERS

Moderator:
Chief Investment Officer, **Dhandsa Family Office/HFIM**

Panellists:
Partner, **Sussex Partners**
Managing Director, **Gatemore Capital Management (MFO)**
Managing Director/CIO, **CITE Investments**
Chief Investment Officer, **The Laughren Group (SFO)**

15:15-16:15 **1 ON 1 MEETINGS & NETWORKING BREAK**

16:15-16:35 Opportunities in Emerging Markets

Portfolio Manager / Executive Director, **Cullen Funds PLC**

16:35-17:30 WORLD ECONOMICS & POLITICAL RISK IN 2016

- The effect of divergent monetary policies on major currencies
- Eurozone Outlook: QE and what that means for the EURO
- The Swiss floor and the implications for investors
- Emerging Market Currencies - what to expect in 2016
- The global political picture
- Where are the political hotspots?
- Political risks and it’s magnitude

Moderating:

CEO & Founder, **Pepper International LLC (MFO)**

Panellists:
Head of School of Economics, **Kingston University of London**
Vice President of the Board of Trustees, **United Nations Interregional Crime and Justice Research Institute (UNCRI)**

17:30-18:30	**NETWORKING COCKTAIL RECEPTION**

1 on 1 Meetings are 25 minutes in duration with a 5 minute changeover. All meetings are pre-arranged using a meeting management platform