

21 March 2017, Marriott Grosvenor Square Hotel

08:15 Registration and refreshments

08:45 WELCOME ADDRESS: *Scott Harris, Director, Family Office Intelligence*

08:50 CHAIRMAN'S OPENING REMARKS: *Ian Morley, Chairman, Wentworth Hall*

09:00 KEYNOTE ADDRESS: Systemic risk and family investment

- What is systemic risk?
- Five types of systemic risks
- How these risks can affect family investments

Professor Franklin Allen, Professor of Finance and Economics, Executive Director of the Brevan Howard Centre, Imperial College London

09:30 CIO ROUNDTABLE: Wealth preservation in the uncertain world - Seeking return in the low yield environment

- What trends and changes have we seen to asset classes in the low interest rate environment? How have our portfolios changed as a consequence?
- Which asset classes come with the highest risk and which offer most reward?
- Is the past performance analysis helpful to predict future strategies? Macro considerations
- How robust are your investment income streams in the current environment and how can you hedge these?

*Christopher Rossbach, Chief Investment Officer, J. Stern & Co.
Graham Wainer, CEO & Head of Investments, Stonehage Fleming Investment Management
Kevin Corrigan, CIO, Sandaire Investment Office
Carol Pepper, CEO & Founder, Pepper International*

10:10 PANEL: Real estate in clients' portfolio in the world of negative returns

- What role does real estate play in your portfolio?
- Where do you see opportunities and risks when investing in real estate? What type: commercial, industrial or residential /country: UK or international?
- What drives real estate investment decisions— location/ returns/ risk?
- Hotel investments and luxury hospitality – how to start investing in hospitality?

*Vishaal N.Shah, Chief Investment Officer, Niveda Group
Sasha Bernier, Senior Vice President, Cheltenham Investments
Frederic Garcin, President, Monte Carlo Supérieur Capital
Joanna Greenslade, Managing Director, Barwood Capital*

10:50 Morning coffee and networking break

11:20 IDEA SHOWCASE: Quick fire presentations on new ideas and opportunities for investors

Showcase 1: How to deliver reliable double digit returns from UK Property - *Joanna Greenslade, Managing Director, Barwood Capital*

Further showcases tbc

This agenda is work in progress, for any suggestions and comments as well as speaking opportunities please contact nadia.rozario@incisivemedia.com or +44 (0) 207 316 9613

12:10 PANEL: Direct investing vs Fund investing

- Are private equity returns sufficient to justify the risks, illiquidity and additional fees?
- Should you invest directly, through a fund or as a co-investor?
- How to choose the right investment or manager?
- Direct lending: what are the risk and opportunities?

Jonathan Bell, Chief Investment Officer, Stanhope Capital

Harry Wulfsohn, Founder, Fleming Wulfsohn Africa

Gary Martin, Managing Director, The Martin Group

Fred Fruitman, Managing Director, Loeb Holding Corporation

12.50 Lunch and networking break

13.50 DISCUSSION: Assessing private debt market

- Risk and return profile of private debt funds
- Exploring the private debt option - advantages and disadvantages
- Where to find managers of short and medium duration assets with very attractive yields
- Administrative and investment issues for families (KYC/AML requirements)

Moderator: Guy Paterson, Partner, Stanhope Capital

Jean-Yves Chereau, Partner, J. Stern & Co.

Brandon Laughren, Chief Investment Officer, The Laughren Group

Further speakers tbc

14.20 PRESENTATION: Investment perspectives from Asia

- FDI to ODI (Foreign Direct Investment to Outward Direct Investment)
- Drivers for change from China, Taiwan, and Japan
- Indonesia and Vietnam: undersung heroes

Rupert Boswall, Senior Partner, RPC

14.50 CASE STUDY: Evidence Based Investing

- Key findings of EBI analysis
- Different styles investing in liquid capital markets
- The role of EBI in a broader portfolio using a core / satellite approach

Yariv Haim, Founder, Sparrows Capital

15.10 DISCUSSION: Active vs Passive investing

- How do returns compare in managed funds vs. index funds
- A quick review of fixed income and currency exposure
- The evolution of Exchange Traded funds, performance and analysis
- Exploring factor investing – different strategies and structural weaknesses of Smart Beta
- Family offices exposure to index and factor investing

Speakers tbc

15.40 Afternoon coffee and networking break

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16.10 Presentation: Risk management in a family business

- What do you mean by risk and what risks are you trying to manage?
- Behavioural risk drivers and the effects of behavioural risk materialising
- Ideas to measure behavioural risk and ways to mitigate it

Dominik Von Eynern, Partner, Blu Family Office

16.20 ROUNDTABLE: Growing your assets in a socially responsible manner

- How SRI factors influence your investment decision making?
- Incorporating Environmental, Social and Governance (ESG) criteria into investment decision making
- What do you believe constitutes a socially responsible approach?
- Main challenges for investors looking to allocate capital within an SRI framework
- Impact investing - risk, returns and investor expectations

Moderator: Brandon Laughren, Chief Investment Officer, The Laughren Group

Marie-Athena Papathanasiou, Director and Principal, Ecoprosperity Capital

Carol Pepper, CEO & Founder, Pepper International

Alexander Felman, Managing Director, Felman Family Office

17.00 GUEST ADDRESS: Brexit: Why and what next?

The Rt Hon. the Lord David Willetts, Chairman of the Resolution Foundation, former MP and Minister for Universities and Science. Former member of the HM Treasury and No 10 Policy Unit. Visiting Professor at King's College London.

17:40 CHAIRMAN'S CLOSING REMARKS followed by drinks reception

18:30 Private Dinner: By invitation only