



elite

The Leading Private Wealth Management Summit

a **marcusevans** event

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delegate information

5 – 7 November 2018

Fairmont Le Montreux Palace | Montreux | Switzerland

Wisdom outweighs
any wealth.

Sophocles

Confronted by the uncertainty of today's global regulatory and political landscape, Family Office Executives must challenge their traditional investment models and employ their entire arsenal to seize and maintain the much needed returns. Designing a robust asset allocation model holds the key to delivering sustainable performance in this volatile market. Furthermore 21st century technology trends, automation and disruption call for the need to engage the next gen family members into the decision making process to ensure they are prepared for the challenges ahead, while preserving proud traditions.

experience excellence

senior decision makers –
focused environment

The **Elite Summit** is an invitation-only, premium forum bringing together the leading family office investors with the most renowned investment solution providers in an intimate environment for a focused discussion of the latest strategies for best practices in private wealth management.

awaken genius

pioneer ideas – illuminating exchanges

Developed via a profound dialogue with key market players and our extensive proprietary research, the **Elite Summit** programme offers indispensable insights.

WORLD CLASS BRIEFINGS BY

Todd Benjamin, Former Financial Editor, **CNN International**

H.E Mr Zulfiquar Z Ghadiyali, CEO of the Private Office, **H.H. Sheikh Tahnoun Bin Saeed Bin Tahnoun Al Nahyan**

Dr Catherine Mulligan, Co-Director, **Imperial College Centre for Cryptocurrency Research & Engineering**

Professor Eli Talmor, Founder, Institute of Private Equity, **London Business School**

Michael Felman, Managing Director, **ShoreFront Capital**

Alexander Felman, Managing Director, **Felman Family Office**

Eric Munson, CIO, **PSP Ventures**

Edward Goodchild, Director, **CHAWKER & Co**

Nabil Nazer, CIO, **Al Sulaiman Group**

Robert Anthony, Founder, **Anthony & Cie**

Lex van Dam, Partner, **Hampstead Capital**

Brandon Laughren, CIO, **The Laughren Group**

Cheong Wing Kiat, Executive Director, **Wen Ken Group**

Luis Trevino, Managing Director, **Beamonte Investments**

Ariel Barack, Head of Corporate Development, **Saidler & Co**

Asaf Iram, Managing Partner, Investments, **GlenRock**

Alexander Keck, Head of Global Economic Analysis, **WTO**

Stefan Hofrichter, Head of Global Economics & Strategy, **Allianz Global Investors**

Boris Cournède, Deputy Head, Public Economics Division, **OECD**

FRESH THINKING | STIMULATING INTERACTIONS | DYNAMIC PARTNERSHIPS

DYNAMIC MODERATOR



Todd Benjamin, Former Financial Editor, **CNN International**

Todd Benjamin is well known to television audiences across the globe. For 26 years he worked as an anchor, correspondent, and financial editor for CNN. An award winning journalist, Todd has interviewed everyone from Mikhail Gorbachev to Alan Greenspan, Bill Clinton to Tony Blair. He has also interviewed several of the

world's leading CEOs including Lou Gerstner, Jack Welch, and Carlos Ghosn in his CNN series, Benjamin's Boardroom. Todd continues to appear on CNN as an independent analyst to provide live commentary and analysis, where his views on the economy, financial markets and other issues are widely followed. He is also a Visiting Lecturer in Leadership at the London Business School Executive Education programme.

ULTIMATE THINKERS



H.E. Mr Zulfiquar Z Ghadiyali, CEO of the Private Office, **H.H. Sheikh Tahnoon Bin Saeed Bin Tahnoon Al Nahyan**

H.E. Mr. Zulfiquar Ghadiyali is CEO of The Royal Office of His Royal Highness Sheikh Tahnoon bin Saeed bin Tahnoon Al Nahyan-grandson of the king of Abu Dhabi, Al Ain. H.E.'s family business spans across Asia and the Middle East in the field of real estate,

hospitality and general trading. H.E. Mr. Ghadiyali has been involved in various social entrepreneurship projects across Asia, India and Africa. He represents industries and societies at large and has been a pioneer in supporting companies from across the world to establish in Middle East and North Africa with the support of the highest levels through the office of HRH the Sheikh. H.E. is involved on various social and political initiatives and commands several important positions across mining, logistics and the aerospace sectors.



Spotlight on Blockchain Technology and the Role of Digitalisation on Economic Growth

Dr Catherine Mulligan, Co-Director, **Imperial College Centre for Cryptocurrency Research & Engineering**

With the next generation becoming more involved in managing the family fortune modernising wealth management methods is a must.

Digital is the way forward, but with so many emerging technologies, selecting and implementing the right ones is a complicated decision. Dr Catherine Mulligan will offer an expert assessment on blockchain and the risks to beware of and benefits to be gained:

- Providing a summary of the regulatory situation of the crypto currency market
- Presenting an overview of the tech landscape to understand the available options and emerging game-changers
- Utilising technology to exceed the expectations of more expectant clients, regulators and counterparties



The Evolution of Private Equity: Bringing a Unique Joint Practitioner and Academic Perspective

Professor Eli Talmor, Founder, Institute of Private Equity, **London Business School**

What started out as a marginal alternative investment, that served the pensions need for diversified allocation, has now become a key asset class of every institutional portfolio. In this keynote presentation, Professor Talmor will share his insights and observations on this growth and discuss the future trends of private equity as an asset class:

- Examining the factors that elevated private equity to the centre stage of institutional investment
- Uncovering the long-term, sustainable high returns by contrasting private equity with the public stock market

2018 keytopics

UNDERSTANDING THE PRESENT TO FORECAST THE FUTURE

Examining the current political and economic landscape to reveal and take advantage of future market trends

SPECIAL OPPS

Utilising alternative strategies to attain innovative assets in a constantly changing market

THE TECH SAVVY FAMILY OFFICE

Enhancing business operations and offering a unique value proposition by embracing the latest and greatest tech developments

PERFORMANCE SCOUTING

Canvassing global opportunities to source sustained portfolio profitability

UNLOCKING ESG CAPACITY

Developing and implementing socially responsible policies to satisfy ESG requirements and deliver long term value creation

SUCCESS IN SUCCESSION

Creating firm family succession, education and conflict resolution planning to solidify core family values

In the private wealth management field it is getting harder and harder to hear original thought but **marcus evans** has done it once again with the Elite Summit.

Managing Director, Oppenheim & Co.

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COMPELLING PRESENTATIONS

Employing Global Tech Investments to Create a Multi-Generational Family Office



Michael Felman,
Managing Director,
ShoreFront Capital



Alexander Felman,
Managing Director,
Felman Family Office

Fact: The future of a family business is only as promising as the competence of the next generation! Michael and Alexander Felman will examine the economic, political, tech and generational trends to capitalise on the promising opportunities:

- Understanding the current organisational processes to facilitate cross generational collaboration
- Having a clear, organised succession plan to smooth the often rocky transitional period
- Offering key takeaway to integrate into your family office



The Rise of the Family Office Venture Investor **Eric Munson**, CIO, **PSP Ventures**

Driven by the proliferation of wealth and dramatic increase in the number of millionaires around the world, the role of family offices has changed in the last 20 years. Family offices today have tremendous flexibility in the types of companies and industries that they choose for investment. Eric Munson will discuss the venture investment game by examining its' past, present and future:

- Moving away from solely investing in private equity while seeking the right types of direct investments to fit a long-term wealth-generation strategy
- Focussing on investment fundamentals to ensure long-term value creation replaces the 2/20 mentality



Good Governance, Good Business: Aligning Objectives with Family Philosophy

Edward Goodchild, Director, **CHAWKER & Co**

Building a shared vision for the family fortune is fundamental to fostering a high-performance next generation:

- Analysing SFO, MFO and private client structures to determine which maximises the clients' benefit
- Picking the right managers at the right fee level, with the right instructions to run portfolios on a discretionary basis
- Finding a balance between disclosure, discretion and safety to avoid future distress



Family Office Game Plan: Investment Lessons from the World Cup

Nabil Nazer, CIO, **Al Sulaiman Group**

Once every four years, most of the world turns its attention to the soccer pitch. Following the summer euphoria around the FIFA World Cup 2018 Nabil Nazer will host an interactive presentation on drawing parallels from the World Cup to real life investment decisions:

- Understanding the importance of separating emotion from your investment choices
- Maintaining a diversified portfolio across industries and asset classes to have reassurance
- Evaluating various bold approaches to optimise the family wealth portfolio

a sample of recent delegates at the **marcus evans** Elite Summit

Principal
Alden Capital

Partner
Allba Holdings

MD
ALENA

VP
Al Midas International Group

CIO
Arcano Wealth Advisors

Deputy Country Head for Switzerland
Butterfield Trust

MP
Capital Generation Partners

Founder
Denkmann Family Office

MP
Equinox Investments

Principal
Euphrasie Partners

Chairman
FF&P

Partner
Five Minds Family Office

MP
Fuchs Global Family Office

CEO
Harald Quandt Holding

Trustee
Heinz Endowments

Partner & CIO Wealth Management
Iveagh Private Investment House

VP
Kirkbi Family Office

First VP
Lord Rothschild Group

Financial Adviser
Lord Fink Family Office

MD
MaxCap Partners

MD
Omega Capital

CEO
Opticrest

Partner
Orbit Family Office

Chairman & CEO
Pitcairn

Principal
Phileas Family Office

Founder & CEO
Ramella Family Office

Director Wealth Management
SandAire

Head of Investments
Sinara Capital Management

CIO
Stanhope Capital

Founder
Suite 25

Without a doubt the most well organised event I have ever attended. The keynotes and presentations were all of great value.

Director, **Kuberawealth**

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The Rise and Rise of Buzzwords: Demystifying the Myth **Robert Anthony**, Founder, **Anthony & Cie**

Impact investing, cyber currency and blockchain. Renewable energy, high tech and algorithms forensic accounting, base erosion profit sharing and KYC (know your client). It is an undisputable fact that the world today is full of buzz words, but are they really something

new and what has really changed? Robert Anthony will look a little closer at what all these words mean to a family office:

- Identifying the key buzzwords today and how the influences family decisions
- Examining the current opportunities to boost return potential



Listed Equities Gender Investing - The Tide has Turned **Lex van Dam**, Partner, **Hampstead Capital**

Gender Lens Investing is a new trend that offers vast opportunities, however, many investors are still reluctant to explore this novel prospect further. In his presentation, Lex Van Dam will showcase how this is a strategy that generates both alpha and a positive social impact

by investing in shares of public companies which promote the principles of gender equality within their organisation.

- Understanding the importance of gender equality in the workplace and the impact this has on company performance
- Showcasing how businesses that actively promote principles of gender equality within their organisation have outperformed the market over time
- Demonstrating how to identify attractive investment opportunities based on a fundamental investment model



The Pursuit of Yield: Capiatling on Private Debt to Boost ROI

Brandon Laughren, CIO, **The Laughren Group**

HNWI and their family offices often prefer private debt over other asset classes because of the fewer restrictions, increased flexibility and an appetite for higher returns. Brandon Laughren will provide

a description of why his SFO looked for income opportunities outside of the public markets and shed light on key investable areas and their major characteristics:

- Partnering with other family offices to improve diligence on investment managers
- Assessing the key criteria in evaluating a private debt manager



Passion and High Returns: How a Labour of Love can Turn into a Profitable Investment

Cheong Wing Kiat, Executive Director, **Wen Ken Group**

Without a doubt passion investments have now become a new avenue for family offices, but the question still lies in how passion can turn into profit. Using his famous Rate on Investment, Alignment

of Objectives, Time and Emotion (RATE), business family successor cum strategist, Cheong Wing Kiat will demonstrate how UHNWI & HNWI can add even more value to their portfolios through passion investments such as Art & Amber:

- Putting the right governance framework in place to provide a great vehicle for families to indulge their passions
- Exploring the emotional and financial rewards

engaging agenda

strategic meetings – prolific networking

day 1

10:00-12:00	Event Registration
12:00-13:00	Lunch
13:00-13:15	Chairman's Opening
13:15-14:00	Opening Keynote
14:00-14:45	Parallel Sessions
14:45-15:00	Networking Coffee Break
15:00-17:00	One-to-One Meetings
17:00-17:45	Parallel Sessions
17:45-18:30	Masterclasses
18:30-19:30	Interactive Forum
19:30-20:00	Free Time
20:00-20:30	Welcome Reception
20:30	Welcome Dinner

day 2

07:30-08:45	Breakfast
09:00-09:45	Keynote Presentation
09:45-10:30	Masterclasses
10:30-10:45	Networking Coffee Break
10:45-12:45	One-to-One Meetings
12:45-13:45	Lunch
13:45-14:45	Interactive Forum
14:45-15:30	Parallel Sessions
15:30-15:45	Networking Coffee Break
15:45-17:45	One-to-One Meetings
17:45-18:30	Parallel Sessions
18:30-19:15	Keynote Presentation
19:15	Evening Reception

day 3

07:30-08:45	Breakfast
08:45-09:45	Keynote Presentation
09:45-10:30	Parallel Sessions
10:30-10:45	Networking Coffee Break
10:45-12:15	One-to-One Meetings
12:15-13:00	Parallel Sessions
13:00-13:45	Closing Keynote
14:00-15:00	Closing Lunch



A great format that offers optimal results in terms of new investment ideas, product details and new business solutions delivered in a disciplined but easy to absorb fashion.

Partner, **Atica Partners**

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INTERACTIVE FORUMS

The Tech-Savvy Forum

Leading on the Journey of Technology Disruption: Exploring the Trends, Success Stories and Pitfalls



Ariel Barack,
Head of Corporate
Development,
Saidler & Co



Asaf Iram,
Managing Partner,
Investments,
GlenRock

Over the past few decades better metrics have become available and investors today take on a more analytical, data-driven approach. As technology and innovation combine with disruptive force, families and their advisors will continually be faced with novel opportunities, thoughts and challenges in increasing and protecting wealth:

- Leveraging technology, as well as traditional and alternative sources of data to improve efficiency
- Providing an edge through differentiated insight and productivity gains

Economic Outlook Forum

Examining the Prognosis for the Global Economy and Its Impact on Portfolio Trends



Alexander Keck,
Head of Global Economic
Analysis,
WTO



Stefan Hofrichter,
Head of Global
Economics & Strategy,
**Allianz Global
Investors**



Boris Cournède,
Deputy Head, Public
Economics Division,
OECD

While economic growth is picking up, geopolitical events and risk are still driving uncertainty. Though it is difficult to determine how financial markets will evolve, a panel of experts shares their views on the current status of the global economy:

- Measuring the trickle-down effect of macroeconomic and geopolitical events on asset pricing
- Assessing the potential impact of policy decisions on the current path towards growth
- Predicting growth across economic regions and sectors to uncover promising investment opportunities

unsurpassed organisation passion for innovation – steadfast dedication

The **marcus evans** group has been producing high level business events for over 30 years. We are dedicated to helping our clients achieve their goals by providing world class global business intelligence services and information to assist in their strategic and effective decision-making.

As one of the world's leading business information companies, **marcus evans** provides many products that will assist an organisation in developing its strategies and enable growth. **marcus evans** develops major sector-focused events, providing business and networking opportunities across a variety of industries and professions. We aim to meet all of your strategic business information requirements through the delivery of premium products and services by way of a variety of media.

We consider innovation to be vital. We are a company of original thought, and through ongoing extensive analysis into clients' business needs, we provide the information you require for your future success.

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multiply opportunities proven event format – excellence in execution

Your delegate package at the Elite Summit includes all the essentials needed for a productive and rewarding event. As a delegate at the summit, you will receive:

- **A three-day streamlined agenda** consisting of compelling presentations, interactive forums and business meetings provoking your creativity, and offering superior knowledge and practical insights
- **Access to the secured event website** where you can review premium event content and attending solution providers to make educated meeting selections and optimise the use of your time
- **A comprehensive directory of solution providers**, allowing ample time to research and identify products which efficiently address the most pressing needs of your organisation
- **An experienced event management team** dedicated to facilitating your participation and ensuring optimal use of your time out of office
- **All meals and networking activities**
- **Two nights accommodation**

unanimous recognition instant productivity – relevant content

For first-hand delegate experiences, **click here to watch**



The event to attend in the family office space!

Advisor to the Principal, OFBV SFO