

World Family Office Forum | Europe

3-4 June 2024

Fairmont Le Montreux Palace Hotel,
Montreux, Switzerland



The Event

The World Family Office Forum | Europe is an exclusive business event, uniting the region's leading business families and single family offices.

Overview

The Summit is an essential event for elite family office principals and senior family office leadership from across Europe, looking to stay ahead in the dynamic realm of wealth, business, and investments.

Over two days, delegates have the opportunity to:

- Forge valuable connections with like-minded family offices fostering business synergies, co-investments and collaboration.
- Gain insights from your peers navigating the intricacies of investments, and the nuances of regional collaboration.
- Engage with global asset managers, banks and intermediaries to explore unique investment opportunities and strategies.

The Summit is hosted by Connect Group, a world-leading business events organizer renowned for its specialized focus on family office gatherings. Connect Group ensures a fusion of global perspectives and regional expertise at each of our events.

High-level

The Summit maintains a high-level delegation of family business owners, family office principals and their senior management and investment teams representing single family offices from across Europe.

Exclusive

A minimum 70% of the event delegation consists of family offices, and a maximum 30% of asset managers and intermediaries, ensuring a highly exclusive, family office led dialogue, and an environment that promotes effective relationship-building between participants.



Mon 3 Jun

08:00 - 09:00

Registration & Light Breakfast

09:00 - 09:10

Chairman Welcome Remarks

09:10 - 09:50 | Panel Discussion

Legacy & Leadership: Navigating the Nuances of Family Business in Modern Times

Moderator:

[Sally Woodford](#), Independent Strategic Advisor

Panellists:

[Ulrich Schmid-Maybach](#), Founder & President, [The Wilhelm & Karl Maybach Foundation](#)

[Ariane Spandow](#), Chair Board of Directors, [Spabogruppen & Amesto Group](#)

Family businesses are wrought with complexities, from balancing family dynamics with business decisions, integrating the younger generation into leadership roles, effective governance, and the challenges of preserving the family's core values and reputation in a modern market. This discussion will aim to address these issues and explore the role of family businesses in supporting social causes, sustainability, and community development.

09:50 - 10:10 | Fireside Chat

Next Generation Empowerment

The story of a next-gen leader and his creation of influential networks and novel strategies for future-focused leadership.

10:10 - 10:30 | Keynote Presentation

Prosperity & Responsibility

This presentation offers a holistic approach to understanding and managing the complexities of prosperity in today's world.

10:30 - 11:10 | Panel Discussion

Investment Strategies for the Modern Family Office: Adapting to Global Economic and Political Shifts

Panellists:

[Rodolfo De Benedetti](#), Chairman, [CIR Group](#)

[Henrietta Gourlay](#), Investment Director, [Grosvenor](#)

[Davide Tosetti](#), Managing Director, [Tosetti Value - II Family Office](#)

As global markets face heightened volatility from shifting macroeconomic and geopolitical trends, family offices must rethink their investment strategies. This session explores strategies for building resilient portfolios with a focus on portfolio diversification, rebalancing, alternative investments and risk.

11:10 - 11:30

Networking Break / One-To-One Meetings

11:30 - 12:30

Roundtable Discussions

Table 1: Harnessing Mid-Market Potential: Private Equity Insights for Family Offices

Table 2: Unlocking Opportunities in Private Debt: Strategies, Risks, and Innovations

Table 3: Climate Tech: Innovations for a Sustainable Future

Table 4: Public Markets: Dynamic Approaches in a Global Investment Framework

12:30 - 14:00

Networking Lunch

14:00 - 14:40 | Panel Discussion

Venture Capital: Innovation, Entrepreneurship, and Economic Growth

Panellists:

[Isabel Azoulay](#), CEO, [Front Row Family Office](#)

[Ariel Barack](#), Senior Partner & CEO, [Ordway Selections](#)

[Isabelle Freidheim](#), Founder & Managing Partner, [Athena Capital](#)

A look at how global economic and geopolitical trends influence venture capital, highlighting investment flows, startup valuations, key sectors, geographic diversification benefits, and the dynamic between family offices and traditional venture funds.

14:40 - 15:00 | Keynote Presentation

Tech as an Investment Theme: A VC Lens

15:00 - 15:30

Networking Break / One-To-One Meetings

15:30 - 15:50 | Keynote Presentation

Public Markets as a Cornerstone of a Family Portfolio

[Andrew Brenton](#), CEO & Co-Founder, [Turtle Creek Asset Management](#)

15:50 - 16:10 | Keynote Presentation

Steady Performance: Navigating Low Volatility and Diversification for Sustained Growth

[Bas Kooijman](#), CEO, [DHF Capital](#)

16:10 - 17:00 | Panel Discussion

A Family Office Guide to Digital Assets & Web3

Moderator:

[Sandra Ro](#), CEO, [Global Blockchain Business Council](#)

Panellists:

[Tim Draper](#), Founder, [Draper Associates](#)

[Ian Morley](#), Chairman, [Wentworth Hall Family Office](#)

[Lars Seier Christensen](#), Chairman and Founder, [Concordium](#)

Digital assets are gaining momentum among family offices, signalling a transformative shift in wealth management. This discussion will examine the evolving cryptocurrency markets and how Web3 is integrating with traditional finance.

17:00 - 17:40 | Panel Discussion

Beyond Giving: Innovating Philanthropy in the 21st Century

Panellists:

[Christina Anne Kyosti](#), Family Principal & Chairwoman, [ViaTalanta Group](#)

[Simon Franks](#), Founder & Chairman, [Franks Family Foundation](#)

[Alexandre Mars](#), Entrepreneur & Philanthropist

How do we align philanthropic efforts with family values, utilize collaborative giving, understand innovative funding models, and engage the next generation? This panel seeks to answer these questions, offering practical insights for effective philanthropy.

17:40 - 18:00 | Keynote Presentation

SoleFamily: Giving Hope, Relieving Suffering and Making a Positive Impact in Bali

[Robert Epstone](#), Co Founder, [Sole Family Bali Foundation](#)

19:00 - 22:00

Networking Cocktail Reception & Gala Dinner at La Terrasse du Petit Palais with Special Entertainment

Tue 4 Jun

08:00 - 09:00

Networking Breakfast

09:00 - 09:30 | Keynote Presentation

Balancing Transformation, Tradition, and Reputation: Family Office Challenges and Opportunities in 2024

Sally Tennant OBE, Founder, **Acorn Capital Advisers**

09:30 - 10:10 | Panel Discussion

Conscious Capital: Strategies for Effective Impact Investing

Moderator:

Mirjam Garzon, Founder & Managing Partner, **Impact Capital Advisory**

Panellists:

Dimple Sahni, Managing Director Multi-Asset Impact Investing, **Anthos Fund & Asset Management**

Impact investing is reshaping family office priorities, guided by a new generation focused on social and environmental change. This discussion will address the growth drivers of impact investing, strategies for targeting investments with sustainable outcomes, and methods for measuring their societal and environmental impact. Additionally, it will examine tactics for fostering collaboration to amplify impact, providing a roadmap for those looking to make a difference through their investments.

10:10 - 10:30 | Keynote Presentation

From Farm to Fork: Revolutionizing Food Systems

Gain insights from a leading European impact fund on how addressing the global food challenge depends on sustainable methods, cutting-edge technologies, and smart investment.

10:30 - 11:00

Networking Break / One-To-One Meetings

11:00 - 11:40 | Panel Discussion

Transforming Real Estate for Tomorrow's Investor - A Deep Dive into Emerging Trends and Opportunities

Real estate is evolving rapidly to meet the demands of tomorrow's investor, influenced by changing lifestyles and consumer behaviours. "This discussion will explore how these shifts are impacting commercial, retail, and residential real estate markets and what it means for investors. The panel will look into the growing focus on sustainability, green buildings, and the role of proptech in revolutionizing the industry. Looking ahead, the panelists will share their perspectives on the future of the real estate market over the next decade, offering a comprehensive overview of emerging trends and opportunities.

11:40 - 12:00 | Keynote Presentation

Smart Investing: Optimizing Investment Operations with Family Office Software

12:00 - 12:10

Closing Thoughts from the Summit Chair

The Summit Chair looks back on the discussions of the two days sharing his key takeaways.

12:10 - 14:00

Networking Lunch

Enjoy the closing lunch on the Terrasse du Petit Palais.

14:00 - 16:00

Special Event - Lavaux Vineyard Tour & Wine Tasting

Explore the UNESCO-listed terraces of Lavaux on our vineyard tour & wine tasting event. Wander through the vineyards that boast breathtaking views of Lake Geneva and the Alps, while learning about the area's unique winemaking traditions from our knowledgeable guide. The experience concludes with a wine tasting, allowing you to sample a selection of the region's celebrated wines. This event offers a perfect blend of natural beauty and cultural heritage, inviting you to discover the essence of Lavaux's UNESCO-protected landscapes.



Rodolfo De Benedetti

Chairman
CIR Group

Rodolfo De Benedetti (Turin, 1961) has been Chairman of CIR since his appointment in April 2013.

The CIR group, of which he is a controlling shareholder together with his brothers Marco and Edoardo, operates in healthcare (KOS) and auto components (Sogefi). Within the group he is also a member of the Board of Directors of Sogefi.

Previously he was Chief Executive Officer of CIR from 1993 and of COFIDE from 1995. He joined COFIDE in 1988 as Director of International Affairs and was subsequently appointed General Manager. In 1990 he also became General Manager of CIR.

Before his appointments in CIR and COFIDE, he worked from September 1985 to December 1986 for Lombard Odier, one of the main private banking groups in Switzerland based in Geneva, as Assistant to the Chief Executive Officer. From January 1987 to January 1988 he was with Shearson Lehman Brothers (New York) as an Associate in its Merchant Banking Group.

He is a shareholder and director of Decalia S.A., an international asset management company established in 2014.

He is a board member of Aon Italia, a risk management, insurance and re-insurance brokerage, of October, a non-banking financing platform for small and medium-sized businesses, and of the asset manager Planven Investments S.A..

He is also a member of the European Round Table for Industry (ERT), a forum made up of more than 50 of the most important European companies from various sectors, and is Chairman of the European Advisory Board of Harvard Business School.

He graduated from Geneva in 1982 in Political Economics and in 1985 in Law. He is married to Emmanuelle de Villepin and is father to Neige, Alix and Mita.

3rd June

10:30 - 11:10

Panel Discussion:

Investment Strategies for the Modern Family Office:
Adapting to Global Economic and Political Shifts



Sally Tennant OBE

Founder
Acorn Capital Advisers

Sally Tennant is the founder of Acorn Capital Advisers, an independent adviser to ultra-high net worth individuals, families and their trustees.

Acorn Capital Advisers provides strategic investment, family office and philanthropic advisory services, and acts as an outsourced Private Office for a select group of families. She has many years of investment, banking and management experience.

Sally is the Chair of Point72 UK Ltd, a director of B-FLEXION Group Holdings SA, and is Vice-Chair, Trustee and Chair of the Investment Committee for the Royal Academy Trust.

From 2011 to 2014 Sally was CEO of Kleinwort Benson. She was previously Chief Executive of Lombard Odier (UK) Ltd and Chief Executive of Schroders Private Banking. Sally is a patron of Tommy's the Baby Charity.

She holds a degree in Politics from the University of Durham.

4th June

09:00 - 09:30

Keynote Presentation:

Balancing Transformation,
Tradition, and Reputation:
Family Office Challenges and
Opportunities in 2024



Tim Draper

Founder
Draper Associates

Tim Draper founded Draper Associates, DFJ and the Draper Venture Network, a global network of venture capital funds. He funded Baidu, Tesla, Skype, SpaceX, Twitch, Hotmail, Focus Media, Robinhood, Athenahealth, Box, Cruise Automation, Carta, Planet, PTC and 15 other unicorns at the seed stage.

He is a supporter and global thoughtleader for entrepreneurs everywhere, and is a leading spokesperson for Bitcoin, Blockchain, ICOs and cryptocurrencies, having won the Bitcoin US Marshall's auction in 2014, invested in over 50 crypto companies, and led investments in Coinbase, Ledger, Tezos, and Bancor, among others.

He created viral marketing, a marketing method for exponentially spreading an electronic service from customer to customer, instrumental to the successes of Hotmail and Skype and other applications, particularly effective for mail and communications applications. Arguably, social media, crowdsourcing and growth hacking are all outgrowths of viral marketing.

He is regularly featured on all major networks as a proponent for entrepreneurship, innovative governance, free markets and Bitcoin, and has received various awards and honors including the World Entrepreneurship Forum's "Entrepreneur of the World," and is listed as one of the top 100 most powerful people in finance by Worth Magazine, the top 20 most influential people in Crypto by CryptoWeekly, #1 most networked VC by AlwaysOn, #7 on the Forbes Midas List, and #48 most influential Harvard Alum. Global Guru listed Tim as one of the top 30 Startup Gurus in the world.

In promoting entrepreneurship, he created Draper University of Heroes, a residential and online school based in San Mateo, Ca to help extraordinary people accomplish their life missions. The school has trained 1200 entrepreneurs, from 84 different countries, who have built 400 companies including NVision, and crypto leaders, QTUM, Spacecash, and DataWallet. He started Innovate Your State, a non-profit dedicated to crowdsource innovation in government, and BizWorld, a non-profit that teaches young children how business and entrepreneurship work.

He served on the California State Board of Education, and led a movement for Local Choice in schools culminating in becoming proponent for a statewide initiative for School Vouchers. He also led a statewide initiative to create competitive governance with Six Californias, followed by an initiative for Three Californias.

Tim Draper received a Bachelor of Science from Stanford University with a major in electrical engineering and a Master of Business Administration from the Harvard Business School. He has two honorary doctorates from The International University and Trinity College of Dublin. He wrote the book, "How to be The Startup Hero."

3rd June

16:10 - 17:00

Panel Discussion:

A Family Office Guide to Digital Assets & Web3



Christina Anne Kyosti

Family Principal & Chairwoman
ViaTalenta Group

Christina-Anne is the Chair of ViaTalenta Group and an active purpose-led investor. Born in Denmark to a French-Italian family and educated in England and the United States, Christina-Anne trained as a physician and a strategist before assuming the leadership of the family offices. A proponent of impact investments as an alternative to traditional family investment and philanthropic strategies, she leads flagship value chain portfolios in Energy & Environment, Health Care, Education and Design, Media, Design & Entertainment.

3rd June

17:00 - 17:40

Panel Discussion:

Beyond Giving: Innovating
Philanthropy in the 21st
Century



Lars Seier Christensen

Chairman and Founder
Concordium

Chairman and Founder of Concordium, Lars is a Danish entrepreneur and trailblazing investor at the forefront of driving technological innovation in the financial sector. As the co-founder of global online trading and investment platform, Saxo Bank, and Concordium, a science-backed L1, Lars has undoubtedly played a role in etching the landscape of modern financial services. Lars is the founder and CEO of his single-family office, Seier Capital, which invests in a range of technology and lifestyle companies. In recent years, the primary focus has been on investments in blockchain projects and revolutionizing secure business transactions through blockchain technology.

3rd June

16:10 - 17:00

Panel Discussion:

A Family Office Guide to Digital
Assets & Web3



Ariane Spadow

Chair Board of Directors
Spabogruppen & Amesto Group

After founding and running her own company Ariane (47) decided to join the family business operations in 2012. She has since then worked to institute sustainable operations with a social perspective as the bedrock of all companies in the Group. In 2021 she became Chairwoman of Spabogruppen and Amesto Group. She is passionate about sustainable businesses and constantly exploring the different possible ways in which Amesto and Spabo can work with corporate social value in a strategic way. Her aim is that the bottom line in all the companies within Spabogruppen will be reflected in a triple bottom line.

3rd June

09:10 - 09:50

Panel Discussion:

Legacy & Leadership:
Navigating the Nuances of
Family Business in Modern
Times



Alexandre Mars

Entrepreneur & Philanthropist

Alexandre Mars began his career as an entrepreneur at the age of seventeen. Over the course of years of tireless work launching and developing successful startups, he sold two of his companies to Publicis and BlackBerry. Nevertheless, creating tech ventures was never his end goal. His entrepreneurial successes afforded him the financial security to fuel the much larger social ambitions he had harbored since his youth: to be of use to society. That's why Alexandre decided to leverage his entrepreneurial skills, network, knowledge, wealth, and influence to scale his impact and contribute to a more just and fair society.

To foster that mission, he first created Epic, a global foundation that helps empower and protect children, youth, and our planet by bridging the gap between impactful nonprofits and individuals and businesses seeking to enact positive change. In 2019, the Harvard Kennedy School published a case study on Epic, highlighting its innovative new model for social impact.

A firm believer that the private sector also has a crucial role in making our society more just and sustainable, Mars founded blisce/, a leading B Corp investment firm committed to investing differently by reconciling economic, social, and environmental performance. Since its inception, blisce/ has invested in companies such as Spotify, Headspace, Pinterest or Too Good To Go.

True to his commitment to social justice, Alexandre also founded INFINITE, a social EdTech that supports students from underprivileged backgrounds in their access to the world's most renowned schools and universities and in their first steps into the professional world, through an innovative student loan offer. INFINITE's mission is to encourage the success of talented young people in order to contribute to the creation of a new generation of leaders, more representative of the richness of our society.

Mars' passion for sports and his commitment to greater social justice also led him to become an Ambassador and Board member of the Paris 2024 Olympic and Paralympic Games. He is actively contributing to the challenge of ensuring the social legacy of this unique event, beyond the competition itself.

He is also the host of the podcast PAUSE, in which he invites artists, business leaders, writers, entrepreneurs, athletes, and activists to share the secrets behind their professional and personal journeys.

Mars is the author of *Giving: Purpose is the New Currency* (HarperOne/HarperCollins, 2019), and *Mission Possible: How to Build a Business for Our Times* (Nicholas Brealey Publishing, 2022), from which he has developed a masterclass.

Mars has been named a Knight of the Legion of Honor, France's highest civilian award order, a "Top 50 Philanthropist of The Year" (Town & Country), one of "The 50 Most Influential French People" (Vanity Fair).

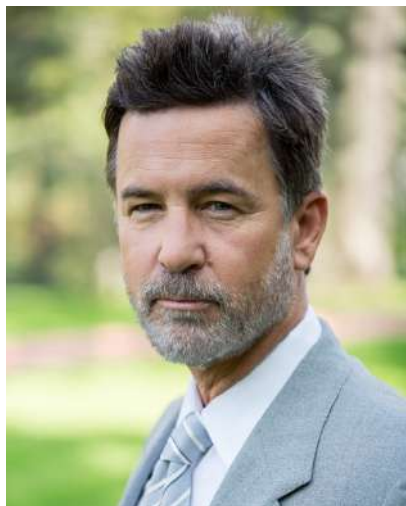
He practices krav-maga and long-distance running and has completed the Paris and New York marathons. He is married, has four children, and enjoys traveling the world with his family.

3rd June

17:00 - 17:40

Panel Discussion:

Beyond Giving: Innovating
Philanthropy in the 21st
Century



Ulrich Schmid-Maybach

Founder & President

The Wilhelm & Karl Maybach Foundation

Maybach guided the successful company IPO in 2007 of what had been the original Maybach Motorworks, and subsequently diversified into real estate and technology forming strong connections to founders, and investment opportunities across the globe, with a particular nexus in Silicon Valley.

He established the Maybach Foundation, which acknowledges the humble origins of his great grandfather the orphaned Wilhelm Maybach designer of the first Mercedes and promotes mentoring to achieve social and economic good. The Foundation is also building a Maybach archive and heritage showroom in the Maybach Motorworks hometown of Friedrichshafen, Germany.

Maybach is cofounder of the official *Maybach Icons of Luxury* accessory brand with its growing number of global iconic boutiques, and 500+ resellers worldwide.

Maybach served as ambassador for the reinvigorated Maybach automotive brand since its inception in 1997. He has a master's degree in international business with a focus on US – German relations and is a featured speaker at various family office and private wealth conferences worldwide, where he shares insights on building and sustaining the family brand. This topic is of profound interest to both well-established multi-generational family offices and the emerging ones from the global tech and start-up communities.

3rd June

09:10 - 09:50

Panel Discussion:

Legacy & Leadership:
Navigating the Nuances of
Family Business in Modern
Times



Isabelle Freidheim

Founder & Managing Partner
Athena Capital

Isabelle Freidheim is one of the youngest chairwomen of a publicly traded company in the U.S. She is also the founder and managing partner of Athena Capital, overseeing the company's strategic direction and leading its efforts in identifying and investing in technology companies. Freidheim is an entrepreneur and investor with more than 15 years of experience in venture capital, private equity, SPACs and IPOs. She founded Athena in 2020 and has built teams to include board members of Fortune 100 companies and CEOs, Fortune 500 companies, company founders and investors. Freidheim is a member of The Council on Foreign Relations and an alumna of Fortune's Most Powerful Women.

3rd June

14:00 - 14:40

Panel Discussion:

Venture Capital: Innovation,
Entrepreneurship, and
Economic Growth



Isabel Azoulay

CEO
Front Row Family Office

Isabel Azoulay is CEO of FrontRow Family Office. FrontRow focuses on investment advisory, covering mainly private strategies through partner funds and in house allocations powered by proprietary MBL tools. Previously Isabel spent 12 years as Head of Investment Advisory at Lutetia Capital in Paris. She has 25 years of experience in finance, including investment banking and sales&trading at Donaldson, Lufkin & Jenrette, JPMorgan and Goldman Sachs in New York, London and Paris. Isabel holds a BA from Princeton University and an MBA from Harvard Business School.

3rd June

14:00 - 14:40

Panel Discussion:

Venture Capital: Innovation,
Entrepreneurship, and
Economic Growth



Davide Tosetti

Managing Director
Tosetti Value - II Family Office

Davide Tosetti, Managing Director at Tosetti Value SIM, a leading Italian Multi Family Office. Before joining Tosetti Value SIM in 2021, Davide Tosetti was a Director at UBS focusing on UHNWI clients. Davide has a degree in Business Administration at Università degli studi di Torino and EPP at Harvard Business School in Private Equity and Venture Capital, before UBS he worked for eight years between Asia, California and London managing UHNWI clients.

3rd June
10:30 - 11:10

Panel Discussion:

Investment Strategies for the
Modern Family Office:
Adapting to Global Economic
and Political Shifts



Dimple Sahni

Managing Director Multi-Asset Impact Investing
Anthos Fund & Asset Management

Dimple Sahni is Managing Director Multi-Asset Impact Investing at Anthos Fund & Asset Management, a values-based asset manager, rooted in a single family office. She is responsible for originating investments, managing relationships, and helping to execute strategies for the fund portfolios at Anthos Fund & Asset Management dedicated to impact investing across all asset classes including private, listed and real assets. In this de facto Mixed Asset Impact CIO role, she leads the firm's strategy on impact portfolio construction and asset allocation.

In addition, Dimple also serves on the Investment Committee of the Nathan Cummings Foundation in support of 100% mission-aligned investing. She is also an inaugural member of the Global Impact Leaders, a curated community of thought leaders in impact developed by the Sorenson Impact Center. In 2021, Dimple was recognised in PEI's (Private Equity International) global list as one of the 10 most influential women investing across asset classes. In 2022 and 2023, she earned a place in the Top 50 Women in Sustainable Finance in the Netherlands.

Originally from India, Dimple is an experienced investment professional – with over 20 years of experience in impact investing, investment banking and venture capital – who began her career in finance working for Goldman Sachs. She then launched a social enterprise focused on education, Epylon, which was later sold to Accenture. After working at L Capital Partners where she was a Kauffman Fellow, she shifted to impact investing at the Omidyar Network, Pierre Omidyar's philanthropic investment arm. She continued her impact investing career with Unilever Corporate Ventures on its exploration of emerging Asia. Most recently she was fund principal at the Hattery, an early stage impact investing and design firm which was sold to Google.

Dimple holds an MBA in Finance from the Wharton School and a BA in Economics from the University of Chicago. She is based in Amsterdam and she speaks English, Hindi and Dutch.

4th June

09:30 - 10:10

Panel Discussion:

Conscious Capital: Strategies
for Effective Impact Investing



Mirjam Garzon

Founder & Managing Partner
Impact Capital Advisory

Mirjam Garzon holds the position of Senior Advisor at the Global Impact Investing Network (GIIN) and is the founder of Impact Capital Advisory. The GIIN is the premier global think tank for impact investing, offering guidance, conducting research, and establishing the most widely accepted standard for impact measurement. Meanwhile, Impact Capital Advisory, based in Switzerland, specializes in assisting investors and financial intermediaries in crafting and executing tailored impact strategies. Additionally, Mirjam serves as a Board Member of Tameo Impact Fund Solutions, a leading specialist in impact data. Prior to her current roles, she held the position of Head of Global Business Development and Product Management at responsAbility, a pioneering firm in impact asset management. Mirjam Garzon's professional journey commenced in the traditional financial sector, where she gained experience in asset management, derivatives, and risk management across various institutions. She holds a master's degree in International Relations from the Graduate Institute of International and Development Studies in Geneva.

4th June

09:30 - 10:10

Panel Discussion:

Conscious Capital: Strategies
for Effective Impact Investing



Sally Woodford

Independent Strategic Advisor

Sally Woodford is a trusted advisor to UHNW families, delivering expertise and service in intergenerational family dynamics, family office design, governance structures, estate planning, private collection and project management, and philanthropy. Prior to her consulting work, Sally held key leadership positions in private family offices. She holds STEP certificates in International Trust Management and Company Law, and is an honors graduate of Oxford University and of University College London.

3rd June

09:10 - 09:50

Panel Discussion:

Legacy & Leadership:
Navigating the Nuances of
Family Business in Modern
Times



Ian Morley

Chairman
Wentworth Hall Family Office

Ian Morley is a successful business Angel and Entrepreneur.

He is the Chairman of Wentworth Hall Family Office and Consultancy, Chairman of YRD, an award-winning Crypto Fund. Chairman of Saltem Healthcare Ltd, Chairman of Regenerative Medical Group, NED at Conister Bank, NED at CF@L, Director of Condor Trade and also holds various Directorships with a range of other companies covering Property, Alternative energy, medical devices and Care.

He is the author of Morley's Laws of Business and Fund Management and one of the leading global figures and pioneers in the development of the Hedge Fund Industry. He ran one of Europe's first and oldest Fund of Funds and subsequently helped build one of Europe's largest privately-owned Fund of Funds. He has helped build, manage, own, buy, sell and mentor start-up businesses over the last twenty years. He founded and was elected the first Chairman of what is today known as The Alternative Investment Management Association (AIMA), the world's only truly global trade association for the Hedge Fund Industry. He has advised Central Banks, International Regulators and other International Organisations such as the EU and OECD on matters related to Economics, Markets and Regulation. He is actively involved in Family Office conferences and networks.

His articles have been published in such papers as The London Times, FT, International Herald Tribune and various trade publications. He has appeared frequently on BBC, radio and TV, Sky, CNN, CNBC, Bloomberg and various international TV and radio stations.

Ian trained as an Economist at LSE where he was Vice President of the Students Union. He is a member of Gray's Inn and one of the few fund managers to be accredited as a journalist.

Ian served as a battle medic with a MASH unit and has completed sixteen International Marathons, one hundred and fifty Half Marathons and competed in weight lifting and dancing competitions. He was the London Theater Correspondent for the Irish Stage and Screen. He has also written about Running and Building a house in Italy for Italy Magazine. His other interests include boating, football, politics and philanthropy. He lives in London and Italy.

3rd June
16:10 - 17:00

Panel Discussion:

A Family Office Guide to Digital Assets & Web3



Henrietta Gourlay

Investment Director
Grosvenor Family Office

Henri is the Investment Director of the Financial Investment Portfolio at the Grosvenor Family office, having taken over leadership of the portfolio from Ian Prideaux in 2022. Henri started her career in the City at Mercury Asset Management in the late 1990s and joined the newly formed European high yield bond team in 2000 as a credit analyst. In 2003 she left MLIM and joined WAMCO as a high yield analyst/Portfolio Manager in London, and was posted to Asia to start investing in Asian high yield in early 2007. She returned to the UK in 2012 having had two of her children out in Singapore and left the City to focus on her family, but in 2017 was selected for a Women Returner's scheme by Mizuho which enabled her to re-focus her career back in investment.

3rd June

10:30 - 11:10

Panel Discussion:

Investment Strategies for the
Modern Family Office:
Adapting to Global Economic
and Political Shifts



Sandra Ro

CEO

Global Blockchain Business Council

Sandra is a proponent for 'human-centric tech'. From investment banking and currency markets to blockchain technology, she is an early angel investor and advocate of cryptocurrencies and digital assets. She currently serves as the CEO of Global Blockchain Business Council (GBBC), the world's largest leading Swiss-based non-for-profit association with more than 500 institutional members, 301 ambassadors, across 117 jurisdictions and disciplines. In 2023, she was appointed onto the CFTC Commissioner Caroline Pham's Global Markets Advisory Committee (GMAC), Digital Asset Market Subcommittee (DAMS) and cochairs the Taxonomy and Tokenization Infrastructure workstreams within the subcommittee. She was previously appointed as the Senate representative of the New York State Digital Currency Task Force, and serves on the AIFC Fintech Council (Kazakhstan), World Economic Forum's Digital Currencies Governance Consortium, International Securities Services Association's DLT & ISO Standards, GI Trust FATF Travel Rule Standards Task Force (South Korea), GBBC's Global Standards Mapping Initiative, Blockchain for Climate (BxC) Board, Salesforce's AI Advisory Board, Filecoin Foundation Advisory Board, United Nations World Food Programme (WFP) Innovation Accelerator Advisory Council, and several government Convergence AI working groups and councils as well as Board director of several fintech start-ups. Sandra was a founding member of many of the earliest blockchain associations including Hyperledger Foundation, The Linux Foundation, the Post Trade Distributed Ledger Group (PTDL) and the Enterprise Ethereum Alliance (EEA). She is a frequent guest lecturer and hackathon judge at universities discussing topics from fintech to data privacy and harnessing emerging technologies to solve real world problems and has testified and presented in front of governments including the U.S. Senate Committee - Agriculture, Nutrition & Forestry, UK House of Lords, Economic Affairs Committee, European Parliament, South Korea's National Assembly, U.S. Senate Committee on the Judiciary, in both closed door and public forums. Whilst at CME Group, she headed FX & Metals Research & Product Development and founded a new business unit, Digitization. Sandra and her team created the CME CF Bitcoin pricing index and reference rate, CME Bitcoin Futures, and post trade, clearing and settlement solutions. She and her team filed the first set of crypto derivatives patents with the US Patent & Trademark Office (USPTO). Sandra was one of the corporate digital asset pioneers to recognize the potential of this technology and its many applications; she presented at one of the first CFTC Technology Advisory Committee (TAC) on the potential of blockchain technology on February 23, 2016. Previously, she was a London-based derivatives banker at Morgan Stanley and Deutsche Bank in the foreign exchange and interest rate markets. Sandra holds a M.B.A. in Finance and Accounting from London Business School, studied Computer Science at Columbia University, School of Continuing Studies and earned a double B.A. degree from Yale University in History (Military) and Studies in the Environment.

3rd June

16:10 - 17:00

Panel Discussion:

A Family Office Guide to Digital Assets & Web3



Andrew Brenton

CEO & Co-Founder
Turtle Creek Asset Management

Andrew Brenton is the CEO and a co-founder of Turtle Creek. Previously, Mr. Brenton founded and was the CEO of the private equity subsidiary of The Bank of Nova Scotia where he invested in control positions of a dozen Canadian private companies. Mr. Brenton was head of the high technology investment banking practice of Scotia Capital in the early 1990's and prior to that, he was a founding member and Managing Director in the firm's mergers and acquisitions practice.

3rd June

15:30 - 15:50

Keynote Presentation:

Public Markets as a
Cornerstone of a Family
Portfolio



Robert Epstone

Co-Founder

Sole Family Bali Foundation

Robert Epstone established Yayasan Solemen Indonesia in 2011 which gained a reputation as one of Bali's most respected and reputable non-profit organisations. To date they have supported over 900 families with a physically or mentally disabled or sick member. In March 2023 'Solemen' rebranded to the SoleFamily Bali Foundation with Sarah Chapman as co-founder, a new legal framework and a passionate, dynamic new board. Their dedicated team provides healthcare, support, advice, and compassion whilst making a lasting impact on the lives of those it serves in Bali.

Before dedicating himself to philanthropy, Epstone had a diverse career beginning with his education at Clifton College, Bristol (1962-66), followed by earning a BA in Textile Management from Leeds University (1969). His early career included extensive travel in the USA and a swift rise through various roles in production, sales, and marketing, eventually becoming the Joint Managing Director of the Hepton Group of Companies (1971-78). He played a pivotal role in expanding the British clothing export markets as a member of the British Clothing Export Council and was recognized by Woolmark as 'Designer of the Year' in 1976.

Epstone also ventured into fashion brand licensing, establishing a successful menswear brand in Japan and working extensively in Shanghai to develop high-quality clothing for major brands like Marks & Spencer. His commitment extended beyond fashion; in the early 1990s, he managed a rock band and spearheaded relief efforts in war-torn Kosovo. After decades of influence in fashion and music, Epstone moved to Bali to focus on improving lives through his foundation, embodying his lifelong dedication to impactful endeavors.

3rd June

17:40 - 18:00

Keynote Presentation:

SoleFamily: Giving Hope,
Relieving Suffering and Making
a Positive Impact in Bali



Bas Kooijman

CEO
DHF Capital

Bas Kooijman is the CEO and Asset Manager of DHF Capital S.A, a securitisation firm for financial services which he co-founded in 2020. Entrepreneurial from a young age, Bas has worked in the technology industry, building a telecom company, and later Brokerteam, a wholesale telecom company. In 2015, he sold the latter and transitioned into finance. Over the past seven years, Bas' expertise as a professional trader has built wealth for countless individuals and companies. In his pursuit of making wealth creation more accessible and affordable for all, he has also become a published author of "Trading and Investing" to accelerate this vision.

3rd June

15:50 - 16:10

Keynote Presentation:

Steady Performance:
Navigating Low Volatility and
Diversification for Sustained
Growth



Ariel Barack

Senior Partner & CEO
Ordway Selections

Mr. Ariel Barack is the Senior Partner and CEO of Ordway Selections, deploying strategic capital to shape our future sustainable and economically viable food system. With over two decades of leadership and operational experience in both publicly listed and family-controlled enterprises, Ariel has demonstrated a steadfast commitment to innovation and sustainable business practices. He serves as a board member at Vestaron, a leading company in the biological pesticides industry. Ariel also contributes his expertise on the advisory boards of several specialist VC investment funds.

3rd June

14:00 - 14:40

Panel Discussion:

Venture Capital: Innovation,
Entrepreneurship, and
Economic Growth

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