

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.





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



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
ViaTalanta Group

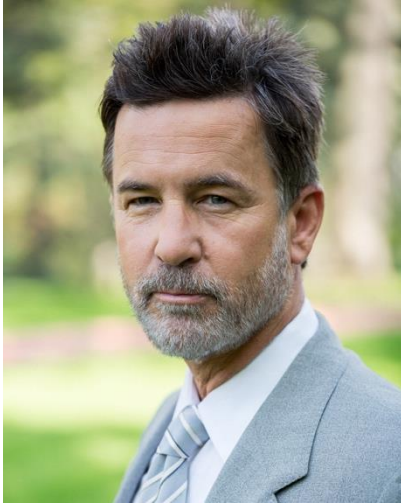
Christina-Anne is the Chair of ViaTalanta Group and an active purpose-led investor. Born in Denmark to a French-Italian family and educated in England and the United States, Christina-Anne trained as a physician and a strategist before assuming the leadership of the family offices. A proponent of impact 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



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



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



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 SaluTem 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



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



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



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



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

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

Panellists:

Ulrich Schmid-Maybach, Founder & President, **The Wilhelm & Karl Maybach Foundation**

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**

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**

A look at the effects of global economic and geopolitical trends on venture capital, focusing on investment flows and startup valuations. The discussion also addresses the sectors drawing investments, the benefits and challenges of geographic diversification in emerging markets versus established hubs, and the dynamics between family offices and traditional venture funds. This discussion aims to shed light on the key drivers of venture capital and its impact on fostering innovation and growth.

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

The Future of Healthcare: A GP Perspective

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**

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 technologies are integrating with traditional finance and what this means for family office investors.

17:00 - 17:40 | Panel Discussion

Beyond Giving: Innovating Philanthropy in the 21st Century

Panellists:

Christina Anne Kyosti, Family Principal & Chairwoman, **ViaTalanta Group**

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

Enjoy cocktails and dinner on the beautiful Terrace de Petit Palais, overlooking the majestic Alps and Lake Geneva.

Tue 4 Jun

08:00 - 09:00

Networking Breakfast

09:00 - 09:40 | Panel Discussion

Conscious Capital: Strategies for Effective Impact Investing

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.

09:40 - 10:00 | 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.

10:00 - 10:20 | Keynote Presentation

Beyond Borders: Unlocking Opportunities in Frontier Markets for Long-Term Social Good

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.

10:20 - 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.

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