World Family Office Forum | Europe

16-17 June 2025
Fairmont Le Montreux Palace Hotel,
Montreux, Switzerland

www.worldfamilyofficeforum.com

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 16 Jun

08:00 - 09:00
Registration & Light Breakfast

09:00 - 09:10
Chairman Welcome Remarks
Rich Robinson, Evangelist, Entrepreneur, Advisor, Investor, Professor and Curious Connector

09:10 - 09:50 | Panel Discussion
The Multigenerational Family Business: Sustaining Growth, Governance & Legacy

This session will explore how multigenerational family businesses can successfully navigate leadership transitions, strengthen governance, and manage family relationships.

Moderator:
Jesús Casado Navarro-Rubio, Secretary General, **European Family Businesses (EFB)**
Panellists:
Iida Miettinen, Deputy Chairwoman, **Ensto**
Daria Illy, Change Management Architect, Member of the Board of Directors, **Gruppo Illy SpA**

09:50 - 10:00 | Keynote Presentation
The World Economy in 2025: Outlook and Implications

Michael Heise, Chief Economist, **HQ Trust**

10:00 - 10:40 | Panel Discussion
Global Investment Trends: Preparing for Tomorrow's Opportunities

This session explores how family offices can manage geopolitical risks, balance market investments, optimize alternatives, and strengthen risk management for resilient, diversified portfolios.

Moderator:
Michael Heise, Chief Economist, **HQ Trust**
Panellists:
Ian Prideaux, Former Chief Investment Officer, **Grosvenor**
Roger Studer, CEO, Chairman of the Board & Owner, **Studer Family Office**
Andrea Lo, Managing Partner, **Main Character Capital**

10:40 - 11:00 | Keynote Presentation
Invest Hong Kong

11:00 - 11:30
Networking Break / One-To-One Meetings

11:30 - 12:30
Roundtable Discussions

Table 1: Climate & Resilience: Why Building a Net Zero Economy is the Biggest Investment Opportunity of a Generation
Adrian Bührer, Managing Partner, **Übermorgen Ventures**
Table 2: The New Geography of Family Offices
Laila Al Jefairi, Director, Professional Services Sector, **Qatar Financial Centre**
Table 3: Three Ways to Apply AI to Your Investing Today
Itay Vinik, Co-Founder & CIO, **Equi**
Tory Reiss, Co-Founder and CEO, **Equi**

12:30 - 14:00
Networking Lunch

14:00 - 14:50 | Panel Discussion
Global Venture Capital Trends: The Shifting Landscape and What Family Offices Need to Know

This session will explore the current state of the global venture capital market, examining key trends and emerging opportunities that family offices should consider when looking to deploy capital. The discussion will focus on how venture investing is evolving, the sectors gaining momentum, and strategies to optimize returns while managing risk in today's market.

Panellists:
Arthur Savander, Investor & Board Member, **Fåntell** (SFO)
Anjel Noorbakhsh Ashman, Investment Principal, **Lombos Family Office** (SFO)
Lisa Bosbach, Managing Director, **Cramer Capital** (SFO)

14:50 - 15:10 | Keynote Presentation
Tech Disruption: What's Next for Investors?

Exploring how cutting-edge innovations are reshaping industries and where family offices can find the next big winners.

15:10 - 15:30 | Keynote Presentation
Global Healthcare: Where Are the High-Growth Markets?

Identifying key trends driving healthcare investments, from biotech breakthroughs to digital health, and where to focus.

15:30 - 16:00 | Keynote Presentation
The India Opportunity

Anand Prasanna, Managing Partner, **Iron Pillar**

16:00 - 16:40 | Panel Discussion
Digital Assets & Family Wealth: Strategies for the Future

As digital assets become an increasingly discussed asset class, family offices must decide whether they are a speculative trend or a valuable addition to a diversified portfolio. This session explores risks, opportunities, and best practices for incorporating digital assets into long-term investment strategies.

Moderator:
Rich Robinson, Evangelist, Entrepreneur, Advisor, Investor, Professor and Curious Connector
Panellists:
Cosmo Jiang, General Partner, **Pantera Capital**
Ian Morley, Chairman, **Wentworth Hall Family Office**

16:40 - 17:00 | Keynote Presentation
Web3, DeFi & the Next Evolution of Financial Services

Exploring how Web3 and DeFi are transforming financial services, enabling decentralization, new investment opportunities, and redefining traditional banking.

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 17 Jun

08:00 - 09:00
Networking Breakfast

09:00 - 09:30 | Fireside Chat
Beyond Wealth: Defining Purpose in a Multi-Generational Family Office

How to align wealth with personal values, long-term vision, and a meaningful legacy that endures across generations?

09:30 - 10:10 | Panel Discussion
Scaling Impact: How Families Can Drive Meaningful Change Through Investment

As impact investing matures, families are seeking ways to scale their efforts beyond traditional philanthropy and ESG screens. This session will explore how to structure capital for maximum impact, whether through venture philanthropy, mission-driven private equity, or innovative financing models. We'll discuss the challenges of scaling impact investments while maintaining measurable outcomes, the role of private markets in driving change, and how families can leverage their capital, networks, and influence to create lasting systemic impact.

Moderator:
Dr. Falko Paetzold, Managing Director, **Centre for Sustainable Finance & Private Wealth, University of Zurich**
Panellists:
Ana Pimenta, Chief Impact Strategist, **Blink CV** (SFO)
Markus Linder, Founder, **Triple Impact Ventures** (SFO)
Marije Rhebergen, Director Impact & Communications, **VP Capital** (SFO)

10:10 - 10:30 | Keynote Presentation
The Energy Transition: Opportunities and Risks for Long-Term Investors

As the global push toward decarbonization accelerates, investors must navigate both opportunities and risks in the energy transition. This session will explore key investment themes across renewables, battery storage, grid infrastructure, and emerging technologies, while addressing policy shifts, capital flows, and the long-term impact on portfolios.

10:30 - 11:10 | Panel Discussion
Real Estate Strategies for European Family Offices

With economic shifts, evolving regulations, and changing investment dynamics, family offices across Europe must continuously reassess their real estate strategies. Should they prioritize domestic markets, expand within Europe, or seek opportunities globally? This session will explore the key factors shaping real estate allocations for family offices today—covering asset classes, risk management, and structuring approaches that align with long-term wealth preservation and growth.

Panellists:
Celine Winter, NextGen Principal, **W5 Group**
Peter Ahlström, CEO, **A. Ahlström Real Estate**
H.S.H. Carl-Eduard, Prince of Bismarck, CEO, **Bismarck Family Office**

11:10 - 11:30 | Keynote Presentation
How to Double your Equity Land Entitlement?

Romain Daniellou, Co-Founder, **LandQuire**

11:30 - 12:10 | Panel Discussion
Family Office 2.0: The Next Chapter in Wealth & Legacy

As we close the event, this forward-looking discussion will explore how family offices can evolve to stay relevant in an increasingly complex world. From optimizing governance and operations to integrating new technologies, we'll examine the future of family office structures. The panel will also address the balance between family involvement and professional management, highlighting when to bring in external expertise and how to ensure long-term resilience. This session will leave attendees with key insights on adapting to change and positioning their family office for the future.

Moderator:
Rich Robinson, Evangelist, Entrepreneur, Advisor, Investor, Professor and Curious Connector
Panellists:
Davide Tosetti, Managing Director, **Tosetti Value - Il Family Office**
Jonathan Ordway Fackelmayer, Chairman & Managing Partner, **Ordway Capital** (SFO)
Luca Mentasti, COO, **Nuova Energia Holding**

12:10 - 12:20
Closing Thoughts from the Summit Chair

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

Rich Robinson, Evangelist, Entrepreneur, Advisor, Investor, Professor and Curious Connector

12:20 - 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.

Roger Studer

CEO, Chairman of the Board & Owner
Studer Family Office

Studer Family Office AG manages and invests the wealth of the Studer family and close friends holistically, with a focus on returns and multi-generational growth. As entrepreneurial investors, we finance and develop businesses and real estate projects that demonstrate potential for sustainable growth and value creation. We support both growth-stage and established SMEs seeking a strong and reliable partner by providing succession solutions, capital, expertise, and access to our extensive network. With an independent mindset and approach, we aim to create a positive impact on society and the environment through our ventures.

16th June
10:00 - 10:40

Panel Discussion:

Global Investment Trends: Preparing for Tomorrow's Opportunities

Ian Prideaux

Former Chief Investment Officer
Grosvenor Estate

Ian Prideaux is a highly experienced finance and investment specialist.

From 2006 to 2022 he was the in-house investment expert at the Grosvenor Estate with responsibility for all third party financial assets such as equity, bonds, private equity/venture capital, hedge funds, infrastructure and other diversifiers. His role, culminating in appointment as Chief Investment Officer, comprised asset allocation, manager selection, monitoring of performance and reporting to the Trustees of the Grosvenor Estate. He also advised the Trustees of the Westminster Foundation (charity) and advised on the investment of the defined benefit portfolio of the Group Pension Plan.

He trained as a Chartered Accountant with Price Waterhouse (now PWC) before moving into corporate finance with SG Warburg and then private banking with HSBC.

His non-executive positions include:-

- Finance Committee of National Life Stories (part of the British Library) since 2017
- Investment Committee of Basteir, a single family office since May 2022
- Senior Adviser to Calista, a Luxembourg-based adviser to Single Family Offices on Private Equity, since January 2023.
- Trustee of Hampshire & Isle of Wight Community Foundation since May 2023.

Ian's interests include outdoor sports - sailing (RYA instructor), skiing (BASI instructor), diving (PADI certified), cycling (completed Lands End – John O'Groats for Bowel Cancer Research and London-Paris twice for RBL) and wine (WSET Level 3 with Distinction).

16th June
10:00 - 10:40

Panel Discussion:

Global Investment Trends: Preparing for Tomorrow's Opportunities

Iida Miettinen

Deputy Chairwoman
Ensto

As a family entrepreneur, Iida Miettinen is deeply committed to stewarding long-term value through sustainable innovation. With a strong foundation in strategic development and business management, she blends purpose and performance to guide her family business toward a sustainable future. Iida believes in the power of long-term family businesses to lead systemic change. Her work focuses on driving the green energy transition via improving electricity distribution reliability and fostering circular economy. Her professional journey includes leadership across startups, circular economy initiatives, and industrial business. She serves as a deputy Chair at Ensto, Board member at Ensto Invest, Sewatek, and Inasis.

16th June
09:10 - 09:50

Panel Discussion:

The Multigenerational Family Business: Sustaining Growth, Governance & Legacy

Peter Ahlström

CEO
A. Ahlström Real Estate

Hans Peter Ahlström is the current Managing Director of A. Ahlström Real Estate Ltd, overseeing a diverse €400+ million portfolio across real estate, forestry, and hospitality. The company is part of A. Ahlström Oy - one of Finland's largest industrial owners and a cornerstone of the Ahlström family legacy, which has played a key role in Finnish industry since the 1850s. With over 30 years of senior leadership experience across Finland, Sweden, Norway, Estonia, and Germany, Hans Peter is known for his values-driven management, long-term strategic vision, and ability to build strong, motivated teams. He is fluent in Swedish, Finnish, and English.

17th June
10:30 - 11:10

Panel Discussion:

Real Estate Strategies for European Family Offices

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Luca Mentasti

COO

Nuova Energia Holding

Luca has a long experience in Private Equity investing in global markets and 20 years holding top executive roles in prominent family offices. He is now partner with Nuova Energia Holding, the Loro Piana Family Office. Prior to that he was with an Italian family office based in Switzerland and with a private equity fund. He also spent some years with PwC.

17th June

11:30 - 12:10

Panel Discussion:

Family Office 2.0: The Next Chapter in Wealth & Legacy

Daria Illy

Change Management Architect, Member of the Board of Directors
Gruppo Illy SpA

Daria is part of the fourth generation of a family whose brand is known all over the world, despite this has created its way becoming a leader in governance, sustainability and well-being. With over 20 years of experience in various leadership roles at Gruppo Illy, Daria is a passionate and visionary ESG and DEI expert who helps companies achieve transformative change through their diversity and inclusion efforts. As the founder and lead consultant of Dariailly® Executive Consulting, strategic marketing and hospitality are part of her DNA. Daria is also a board member of several companies and organizations, including a Committee Member at Gruppo Crédit Agricole. She is a sought-after keynote speaker who engages executive leaders and audiences with her inspiring and insightful messages on how diversity and sustainability can drive innovation and growth. Daria is also a mentor, a professor, an author, and a recipient of the Masterpiece Degree Award by Urbino University.

16th June
09:10 - 09:50

Panel Discussion:

The Multigenerational Family Business: Sustaining Growth, Governance & Legacy

H.S.H. Carl-Eduard, Prince of Bismarck

CEO
Bismarck Family Office

H.S.H. Carl-Eduard, Prince of Bismarck is a former member of the German Bundestag and now works as a global consultant across North America, Latin America, Europe, and the Middle East.

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Panel Discussion:

Real Estate Strategies for European Family Offices

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Ana Pimenta

Chief Impact Strategist
Blink CV (SFO)

Ana Pimenta is the Chief Impact Strategist at Blink CV, an international first-generation single-family office based in the Netherlands, where she leads the strategy and measurement to maximize social and environmental impact across diverse projects in venture philanthropy, impact and sustainable investments. With over 16 years of experience in impact investing, private equity / venture capital, and strategy, Ana has held key roles at Santander, EY, Deloitte, Lynx Asset Managers, Third Way Africa, and Alanis Capital, executing projects across sectors like energy, food and agriculture, infrastructure, education, and real estate. A strategic board member and inspirational speaker, Ana frequently lectures on impact investing and measurement, mentors social enterprises and fund managers, helps to build the ecosystem and advocates for systems-driven strategies that catalyze change. She holds a PhD in Economics & Business with a dissertation in Impact Investing & Measurement from Universidad Autónoma de Madrid and a master's in Economics from NOVA SBE.

17th June
09:30 - 10:10

Panel Discussion:

Scaling Impact: How Families Can Drive Meaningful Change Through Investment

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Davide Tosetti

Managing Director
Tosetti Value - Il 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.

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11:30 - 12:10

Panel Discussion:

Family Office 2.0: The Next Chapter in Wealth & Legacy

Lisa Bosbach

Managing Director
Cramer Capital (SFO)

Lisa Bosbach is a finance professional with a strong background in investment management, private equity and strategic advisory. She currently serves as Managing Director at cramer.capital, a modern self-made female family office, where she oversees a multi-asset class portfolio. In her role, Lisa is responsible for developing and executing long-term investment strategies across public equities, private equity, venture capital, real estate and direct investments. Before joining cramer.capital, Lisa was an Associate at Bregal Unternehmerkapital, where she worked on mid-cap private equity transactions and managed portfolio companies. She started her career as a consultant at Oliver Wyman, focusing on corporate finance, M&A and restructuring for clients across various sectors. Her experience spans the full investment lifecycle, from due diligence to value creation and exit planning. Lisa holds a Master of Science in Accounting, Financial Management and Control from Bocconi University in Milan and a Bachelor of Science in Business Administration from WHU – Otto Beisheim School of Management. She is the founder of a growing Slack community for Entrepreneurial Family Offices and regularly hosts networking events to foster exchange and collaboration in the space.

16th June
14:00 - 14:50

Panel Discussion:

Global Venture Capital Trends: The Shifting Landscape and What Family Offices Need to Know

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17th June
10:30 - 11:10

Panel Discussion:

Real Estate Strategies for European Family Offices

Celine Winter

NextGen Principal
W5 Group

Celine Winter is the second-generation principal at W5 Group, a family office founded by her father, Ralph Winter, in 2009 with a focus on innovative real estate investments in the United States. W5 Group, under Celine's leadership, has honed in on "Innovative Living" concepts, creating residential spaces designed to reflect the unique lifestyles of Millennials and Gen Z. Through her extensive research into how these generations want to live, Celine has seamlessly incorporated key insights into the company's residential portfolio, making W5 Group a trailblazer in transformative housing solutions.

A graduate of the University of Miami with a Master's degree in Sustainable Business, Celine has applied her knowledge of sustainability to W5 Group's investment strategy, emphasizing environmentally responsible practices that elevate the appeal and long-term value of the portfolio. This dedication to sustainable business practices aligns with Celine's vision for a future in which real estate serves both the needs of its residents and the environment. Her strategic approach not only responds to emerging trends but also ensures the company remains resilient in a competitive industry.

Beyond her investment role, Celine contributes to developing family office best practices to guide future generations in maintaining and expanding family-led enterprises. Her focus on governance and next-generation planning strengthens the family office structure and promotes the longevity of W5 Group's mission.

Celine is also actively involved with Best Buddies, an NGO that fosters opportunities for individuals with intellectual and developmental disabilities. Her commitment to social impact, alongside her business leadership, highlights a balanced approach to creating meaningful change in both her professional and community efforts. Through her multifaceted work, Celine Winter is helping to shape a legacy of sustainable, innovative living for the next generation.

16th June
09:00 - 09:10

Chairman Welcome Remarks

Rich Robinson

Evangelist, Entrepreneur, Advisor, Investor, Professor and Curious Connector

Rich Robinson is a globally-minded entrepreneur, educator, and advisor with nearly 30 years in Asia's tech and startup ecosystems, especially China. He's co-founded or led eight startups—three of which exited to public companies—while also embracing lessons from ventures that didn't succeed. Rich has supported dozens of startups through advisory roles with HAX, Chinaccelerator, and 500, and currently serves as Entrepreneur-in-Residence at Animoca Brands. He also teaches entrepreneurship at Peking University and mentors with the Schwarzman Scholars program at Tsinghua. A frequent speaker at global events and universities including Harvard and Cambridge, Rich's journey has been featured in The New York Times: http://dealbook.nytimes.com/2014/01/20/a-globetrotting-serial-entrepreneur-finds-roots-in-chinas-start-up-scene/ His unconventional path—from bartender and ski concierge to cycling solo across Africa—reflects a lifelong spirit of adventure. Now based in Bali with his entrepreneur wife and three kids, Rich writes children's books, hosts a podcast, produces stand-up comedy shows, and continues to advise founders with grounded insight and curiosity.

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Adrian Bührer

Managing Partner
Übermorgen Ventures

Adrian Bührer is a well known and experienced Swiss digital entrepreneur, prolific business angel, and Co-Founder & Managing Partner of Übermorgen Ventures, a climate tech-focused venture capital firm investing in startups that reduce greenhouse gases while generating profit. In the last 20 years he has co-founded and exited several companies. As a business angel, Bührer has a strong track record of successful exits and impactful investments, combining deep entrepreneurial experience with strategic mentorship. He actively supports startups with scalable climate solutions through Übermorgen Ventures and fosters innovation with a focus on social and environmental impact. Additionally, he has lectured at top universities like ETH Zurich, HSG and the Lund University of Sweden, sharing his expertise in digital innovation and entrepreneurship for the next generation.

16th June
11:30 - 12:30

Roundtable Discussion:

Climate & Resilience: Why Building a Net Zero Economy is the Biggest Investment Opportunity of a Generation

Michael Heise

Chief Economist
HQ Trust

Michael Heise is an economist with a doctorate from the University of Cologne in Germany. He worked for the German Council of Economic Experts and later as chief economist Chief Economist for DZ Bank, Dresdner Bank and Allianz SE. Since his departure from Allianz in 2019, Michael works as Chief Economist for the multi-family office HQ Trust GmbH and as the founder of macroadvisors, an economic consultancy. Michael teaches economics at Frankfurt University and has written books on the euro area economy and monetary policy. He is a well-known commentator in German and international media. Michael was more than once awarded the title of forecaster of the year by German media. More detail can be found on his website: www.macroadvisors.de

16th June
10:00 - 10:40

Panel Discussion:

Global Investment Trends: Preparing for Tomorrow's Opportunities

Anjel Noorbakhsh Ashman

Investment Principal
Lombos (Family Office)

Anjel leads the illiquid part of a portfolio for a family endowment, underwriting fund commitments to VC funds. She has over 12 years of financial services experience. Anjel started her career at PwC, working in Investment Advisory and qualifying as a CFA charterholder, conducting fund analysis, review, and selection for investors with $1bn+ AUM. Subsequently, at ACL Anjel managed portfolios for an ultra-high-net-worth middle eastern family after a large exit to Nestle, focusing on investment analysis and execution for direct investments in startups. Additionally, Anjel has served as an Angel Investor for Ada Ventures and recently completed a Venture Capital Fellowship at London Business School.

16th June
14:00 - 14:50

Panel Discussion:

Global Venture Capital Trends: The Shifting Landscape and What Family Offices Need to Know

Jonathan Ordway Fackelmayer

Chairman & Managing Partner
Ordway Capital (SFO)

Jonathan has been an investor and financier for more than two decades, co-investing with family offices across the globe. He serves as Managing Partner of Ordway Selections and Ordway Capital. He currently sits on a number of Boards that make up the portfolio, including funds and direct companies. Jonathan's family (Ordway) was the majority and controlling shareholder of 3M (the US corporate) dating back to 1906.

17th June
11:30 - 12:10

Panel Discussion:

Family Office 2.0: The Next Chapter in Wealth & Legacy

16th June
15:10 - 15:30

Keynote Presentation:

Vanessa Xu

Co-Founder, Executive Chairman, and Chief Investment Officer
VS Partners

Ms. Xu is co-founder, Executive Chairman, and Chief Investment Officer of VS Partners, a global asset allocation firm, serving investors worldwide in a fast-changing world. With two-decade of experience in Global capital markets and multi-asset classes as an accomplished and award-winning fund manager, Ms. Xu pioneered the OCIO model (Outsourced Chief Investment Officer) in Asia, which forms the foundation of VS Partners proprietary framework.

Ms. Xu was named the Most Powerful Woman in China by FORTUNE China 2022. She has also been part of the Aspen Institute's community of thought leaders as a Fellow of Aspen China Fellowship Program and a member of the Aspen Global Leadership Network.

In 2022, Ms. Xu co-founded the SuperBridge Council, an apolitical, open, diverse, and multi-cultural global organization comprising a group of renowned business entrepreneurs, capital market experts, and social and cultural leaders from across the world. A prestigious SuperBridge Club was launched—a premier center stage connecting the Global East and South. The Club serves as a year-round ecosystem for value creators, operating through three strategic pillars: Business Enabler, Multidisciplinary Summit and Global Network, and Rainmaker Programme.

Ms. Xu formerly co-founded and built a leading long-only equity manager in the "billion-dollar-club" in Greater China with assets primarily from sovereign-wealth, pension, university endowments, prominent family offices, and large financial institutions, which has won several prestigious awards in the asset management industry.

Dr. Falko Paetzold

Managing Director
Centre for Sustainable Finance & Private Wealth, University of Zurich

Dr. Falko Paetzold founded and leads the Center for Sustainable Finance and Private Wealth (CSP) at the Department of Finance of the University of Zurich. CSP has offshoots in Singapore and San Francisco, and spun-out of the Impact Investing for the Next Generation training program that Falko co-initiated at Harvard University. He holds impact advisory board seats at Pictet, ZKB, and other finance organizations. Falko was a Fellow at Harvard University, PostDoc at MIT Sloan School of Management, Sustainability Analyst at Bank Vontobel, Partner at sustainable investing consultancy Contrast Capital, and assistant professor at EBS University. Falko holds a PhD from the University of Zurich and an MBA from the University of St. Gallen (HSG) in Switzerland.

17th June
09:30 - 10:10

Panel Discussion:

Scaling Impact: How Families Can Drive Meaningful Change Through Investment

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Arthur Savander

Investor & Board Member
Fåntell (SFO)

Arthur Savander is an investor and board member focused on private markets, with experience across venture capital, family offices, and institutional investments and fundraising.

16th June
14:00 - 14:50

Panel Discussion:

Global Venture Capital Trends: The Shifting Landscape and What Family Offices Need to Know

Andrea Lo

Managing Partner
Main Character Capital

Andrea Lo (Managing Partner of Main Character Capital) is a Silicon Valley native with 15+ years experience as a founder, investor, and startup operator. She has led $100mm+ of VC investments from pre-seed to pre-IPO, helped launch or turnaround 4 VC funds, and launched new financial products later adopted by financial institutions. She was recently Head of Investments for a $1B investment arm of a blockchain foundation investing in startups & funds. Andrea is an alumni of UC Berkeley & University of Oxford and Board Member of Junior Achievement of Northern California.

16th June
10:00 - 10:40

Panel Discussion:

Global Investment Trends: Preparing for Tomorrow's Opportunities

Laila Al Jefairi

Director, Professional Services Sector
Qatar Financial Centre

Laila Al Jefairi was appointed Director of the Professional Services Sector at the Qatar Financial Centre (QFC) in December 2024. Prior to this role, she served as Vice President of Business Development from February 2020, where she played a key role in driving the Centre's growth strategy. Laila began her journey at the QFC in 2016 as Head of High-Net-Worth Individuals (HNWIs) and Companies Limited by Guarantee (LLCs (G)), before advancing to Business Development Manager. In these roles, she was instrumental in developing strategies to identify potential clients, explore new sectors and markets, and improve operational efficiency, sales, and business development processes. Before joining QFC, Laila served as a Financial Analyst at the Qatar Central Bank (QCB), where she led the implementation of strategic initiatives and evaluated real estate investment opportunities in London and Europe. Earlier in her career, she worked as an Investor Services Officer at Qatar National Bank (QNB). Laila holds a bachelor's degree in international Affairs from Qatar University and a Master of Science in Accounting and Business Management from Brunel University, UK.

16th June
11:30 - 12:30

Roundtable Discussion:

The New Geography of Family Offices

Markus Linder

Founder
Triple Impact Ventures (SFO)

Markus Linder is a driving force in impact entrepreneurship and investment. As the founder and CEO of Triple Impact Ventures, his family office backs early-stage, impact-driven founders addressing critical climate, biodiversity, and pollution challenges. He also leads inoqo, a SaaS startup empowering grocery retailers and F&B brands to measure, report, communicate, and reduce the environmental impact of their products at scale. Markus's entrepreneurial journey began in 2006 while at Vienna University of Economics and Business Administration, culminating in the founding and leadership of Zoovu, a SaaS pioneer in AI-powered digital sales assistants that secured over €200M in capital.

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09:30 - 10:10

Panel Discussion:

Scaling Impact: How Families Can Drive Meaningful Change Through Investment

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Itay Vinik

Co-Founder & CIO
Equi

Equi Co-Founder and CIO, Itay Vinik previously managed a L/S volatility derivatives hedge fund and a registered investment advisory firm. The fund consistently outperformed its benchmarks while the RIA advised on complex portfolios and hedging strategies. He traded in equity indices, commodity, and FX markets, and utilized complex volatility strategies in various derivative products and index options. Itay began his career within a group at UBS that worked with UHNW clients on option and derivative strategies. He brings over 15 years of experience managing money.

16th June
11:30 - 12:30

Roundtable Discussion:

Three Ways to Apply AI to Your Investing Today

connectgroup

Tory Reiss

Co-Founder and CEO
Equi

Equi Co-Founder and CEO, Tory Reiss is a three-time founder of venture capital-backed financial technology startups. Previously, Tory was the co-founder of Archblock, the creator of the world's first fully-backed USD stablecoin and the B2B lending platform TrueFi (~$1.7B in originations). Prior to Archblock, Tory co-founded Harvest, the first AI-driven debt management and refinancing platform meant to accelerate consumers' journeys out of debt. Outside of business, Tory is an active advocate for criminal justice reform and financial literacy in public education. He's been teaching financial literacy "bootcamps" for over a decade. Tory graduated from Northwestern University with a BA focused on behavioral economics and entrepreneurship in emerging economies.

16th June
11:30 - 12:30

Roundtable Discussion:

Three Ways to Apply AI to Your Investing Today

Jesús Casado Navarro-Rubio

Secretary General
European Family Businesses (EFB)

16th June
09:10 - 09:50

Panel Discussion:

The Multigenerational Family Business: Sustaining Growth, Governance & Legacy

Jesús is familiar with family succession as he went through a non-expected transfer in his own family which led to the sale of his grandparents' company.

His educational path is as direct reflection of his interest in diverse disciplines and cultures: after studying a degree in Law and Economics from Universidad Pontificia Comillas (ICADE-Madrid), he completed his tertiary education with post-graduate studies at Eberhard Karls Universität Tübingen (Germany), at the Spanish Diplomatic School (Madrid) and at the Institut de Sciences Politiques (Paris). He then went on to earn an MBA from ESADE Business School and a Master in Systemic Therapy and Consulting (Neuro Linguistic Programming).

After starting his career as a lawyer for Telefónica in 1998 focusing on international contracts and M&A, Jesús joined the Spanish Family Business Association (IEF). He quickly moved up from Regional Director to International Director and then to Deputy Director General.

In 2006, Jesús was appointed as the Secretary General of European Family Businesses (EFB). Based in Brussels, EFB represents all the National European Family Businesses associations and aims at promoting policies that are conductive to long-term entrepreneurship in Europe. Its members, more than 10.000 family business owners, directly represent more than 10% of the European GDP.

In addition to his role at EFB, Jesús has served as a member of the Board of the Family Firm Institute (FFI) and as a member of the Executive Committee of Family Business Network (FBN-I). Jesús has also been an Academic Collaborator at ESADE and EAE, focusing on Governance and Succession issues. He is family business advisor at Generation 6, member of the Board of several Foundations and a frequent speaker at family business conferences and summits in Europe, Asia, Latin America, and the Middle East.

Jesús is based in Madrid (Spain) and is fluent in Spanish, English, French and German.

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Marije Rhebergen

Director Impact & Communications
VP Capital (SFO)

Marije Rhebergen is Director Impact & Communications at VP Capital, a single family office committed to using capital as a force for good. She leads the integration of impact across VP Capital's diverse investment solutions, ensuring that all investment decisions are aligned with the family's long-term vision for positive societal and environmental change. She is also responsible for internal and external communications on this topic. With over two decades of experience across Europe, Latin America, and Africa, Marije has worked in both the for-profit and non-profit sectors, combining expertise in strategy, sustainability, and strategic communications. Prior to VP Capital, she was Head of Sustainability at DLL, a leading asset finance partner, and held roles at international impact driven organizations such as Fairtrade International and SNV. In addition to her executive role, Marije has been an active board member in several social impact networks. Her work reflects a deep belief that families can and should play a catalytic role in scaling positive impact by embedding purpose at the heart of their investment strategies.

17th June
09:30 - 10:10

Panel Discussion:

Scaling Impact: How Families Can Drive Meaningful Change Through Investment

Anand Prasanna

Managing Partner
Iron Pillar

Anand Prasanna is the Co-founder and Managing Partner at Iron Pillar. Iron Pillar is a growth stage investor specializing in enterprise and consumer technology companies building their core products “from India for India and the world”. Since 2016, the firm have partnered closely with founders to guide their businesses from early growth stage to sustainable enterprises generating $100 million or more in revenue. Anand is a member of the Board of Directors of technology companies including FreshToHome, Servify, Curefoods and Skill-Lync. Previously, Anand was leading the Asia office of Morgan Creek, a global investment management firm, where he helped build and manage their Asia portfolio out of Shanghai. He also have extensive work experience in India and rest of Asia with Sequoia Capital, McKinsey & Co and Squadron Capital.

16th June
15:30 - 16:00

Keynote Presentation:

The India Opportunity

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Cosmo Jiang

General Partner
Pantera Capital

Cosmo oversees Pantera's liquid token strategies as General Partner alongside Dan Morehead. He joined Pantera from Nova River, where he ran a long-biased digital asset fund, underpinned by a fundamental, thesis-driven approach with a multi-year time horizon. He brings over five years of digital asset investing experience and ten years in traditional finance. Prior to launching Nova River, Cosmo was Managing Director at Hitchwood Capital where he was responsible for Consumer and Internet investments. He previously worked at Apollo Global Management in their private equity group and in M&A at Evercore Partners. Cosmo graduated from Harvard University with a B.A. in Applied Mathematics.

16th June
16:00 - 16:40

Panel Discussion:

Digital Assets & Family Wealth: Strategies for the Future

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Romain Daniellou

Co-Founder
LandQuire

Romain Daniellou is the Co-Founder of LandQuire, a U.S. real estate investment firm specializing in off-market land entitlement opportunities. Originally from Bretagne, France, Romain has been living in the U.S. for over 10 years, where he and his business partner identified a major opportunity in the land entitlement space. With a background in computer science, he helped build the company's proprietary data platform. Since its launch in 2021, LandQuire has completed over 130 investment projects and served more than 600 investors from Europe, the Middle East, and Asia.

17th June
11:10 - 11:30

Keynote Presentation:

How to Double your Equity
Land Entitlement?

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Ian Morley

Chairman
Wentworth Hall Family Office

16th June
16:00 - 16:40

Panel Discussion:

Digital Assets & Family Wealth: Strategies for the Future

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.

Let's Connect

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