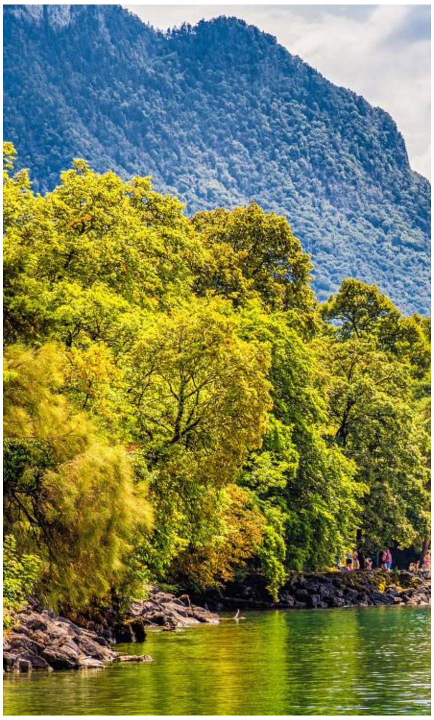
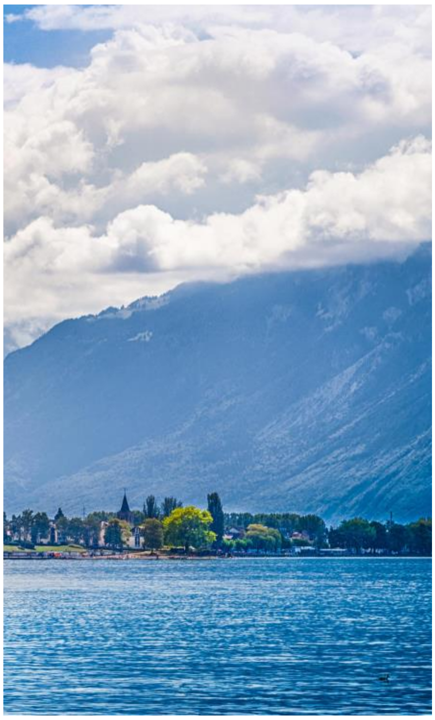
# World Family Office Forum - Europe

**20-21 June 2022**
Fairmont Le Montreux Palace Hotel,
Montreux, Switzerland





www.worldfamilyofficeforum.com

# The Event

*A forum for European Family Offices*

**The World Family Office Forum | Europe has set the gold standard as the region's preeminent forum for European Family Office Principals, Family Business owners and their advisors.**

Now in its second edition, the **World Family Office Forum | Europe** will once more bring together Family Offices from across the region for high-level, peer-to-peer networking, discussion and thought-leadership facilitated through carefully formulated panel discussions, presentations, and interviews.

The event provides Family Office owners and their management teams, a platform to meet with their peers, exchange ideas and insights about the investment environment and share actionable strategies which can help overcome common problems faced by their businesses, in areas such as investments, family dynamics, succession, health and well-being and impact and philanthropy.

### High-level

The Summit maintains a high-level delegation of Family Business owners, Family Office Principals and their senior management 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 event participants.

# The Speakers

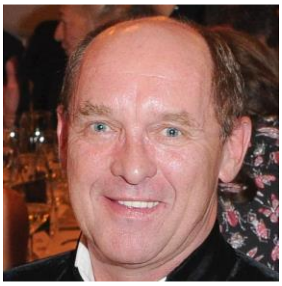
*Expert insights delivered by the leading voices in the industry*

**Guillaume Sarkozy**,
Founding Member &
Chairman, **GSNB Conseil**

Guillaume has an extensive experience of over 40 years of change management as CEO of companies with revenues close to 15 billion euros, navigating the fields of insurance, services, manufacturing industry and for the past 6 years tech start-ups. During his tenure at Health Insurance Malakoff Mederic (30 billions € asset fund), he was instrumental to shape the social welfare and health insurance industry through key alliances. He now counts numerous Non-Executive roles as Board Director and Chairman (SPVIE insurance broker supervisory board, Neobrain, digital insurance Alan, la Scor, Banque Postale Asset Management. Korian Group..) Strategic Advisor roles with investment funds and high-growth companies (Tulip, Vitanlink…). Guillaume appeared regularly in the media (les Echos, Le Figaro, BFMTV, La Tribune …) and as keynote speaker in major insurtech and human capital management conferences in France. He holds a MSc from the Ecole Spéciale des Travaux Publics top 10 French Engineering Grandes Ecoles School and was awarded in 2001 the French National Order of the Legion of honour.

**Dr. Adil Alzarooni**,
CEO, **Al Zarooni**
**Emirates Investments**

Dr. Adil Alzarooni is an Emirati business leader with over 20 years' experience in executive management, investments, sales, logistics, IT security and economic zone development. He currently operates two family offices and has served in various leadership positions within UAE government entities as well as family businesses. He has held directorship positions in firms operating in healthcare, education, financial services, logistics, media, technology, food and beverage, fast moving consumer goods (FMCG) and real estate sectors. Dr. Adil holds a bachelor's degree in engineering from the Etisalat College of Engineering, an MBA from the American University of Sharjah and a PhD in Family Businesses and Business Systems from the British University in Dubai. He has authored Economic Zones: The Essentials and Sustaining Family Businesses: The Essentials.



**H.S.H Prince Carl Eduard von Bismarck**, CEO, **Bismarck Family Office**

**H.S.H Princess Alessandra Silvestri von Bismarck**, Angel Investor, **Bismarck Family Office**

Alessandra Silvestri von Bismarck's extensive experience in the diplomatic world contribute her access to governments leaders and regulatory agencies, advising in the process of implementing new technologies in existing markets. She served as French General Consulesse in Sao Paulo, Brazil, 1997-2000, French Ambassadress in Cuba 2000- 2003, at both occasions elected President's of the wife of Ambassador's respective groups, developing humanitarian cooperation projects, locally engaged in building structures (social, health, security, and educational) providing opportunities to individuals at problematic areas. Art affectionate and collector, she teamed up with the Cannes Film festival for ten years, has conduced interviews with over one hundred Hollywood and European film and music celebrities, curated several art exhibitions, she was the International director of the most extensive film archives in Latin America, the Brazilian Film Foundation and advisor to the European most prestigious one, the Cinematheque Française, creating preservations Film founds at both. During the past sixteen years she is focused in disruptive technologies and renewable energy having implemented innovative IT companies in the European and Latam markets. Alessandra is keen in developing effective strategic partnerships to scale and globalise disruptive business in the energy, fintech and decentralise finance business which are complaint with at least one of the seventeen Sustainable Development Goals set by the United Nations. Due to her international experience, she has the ability to interface cultural differences creating successful cross-cultural teams to implement projects, essential for a globalised market. Alessandra became the Princess of the German House of Bismarck since her marriage with the head of the House of Bismarck, fluent in five languages, has authored a book, directed and produced a documentary. She has lived in main capitals in three continents along the years, studied business administration at Mackenzie University, in Sao Paulo, Brazil, international marketing at the American University of Paris, French Literature at Sorbonne University Paris, France. She advocates for fastening the pace of the necessary shifts in society to achieve better life standard, increase global prosperity, by combining traditional values and cultural heritage with the implementation of cutting edge tech-nologies for the creation of Smart eco-sustainable cities, early crypto investor and Angel investor, she is a board member of Blockchain Compliance Foundation, NFTpro and is an active advisor & connector to several tech startups and companies in Series A.

**Davide Tosetti**, Managing Director, **Tosetti Value - Il Family Office**

Davide Tosetti, is a second generation Managing Director at Tosetti Value SIM, a leading Italian Multi Family Office. Before joining Tosetti Value SIM, Davide Tosetti was a Director at UBS focusing on UHNWI clients including high profile athletes and Next Gen entrepreneurs. 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 mainly in the sport industry.

---

**Doris Sommavilla**, Director, **Stonehage Fleming**

I am Director of Stonehage Fleming within the Family Office Division where I can draw on my experience in succession planning/family governance, both as a 3rd generation entrepreneur and as an advisor to other family businesses. I am Non Executive director of my family business, mainly focused on hospitality and real estate. I inherited my family business abruptly as nothing was planned. I struggled to find my role being the youngest woman back then. I then decided to take the lead on a project to help increase diversification of investments and roles within my family business. This is how I earned my credibility towards my senior family members and external stakeholders. The current crises has further validated my contribution: we have become a resilient family with a proper family governace in place and are navigating the current crises with peace of mind. Leveraging on my own experiences, I co-founded Family Hippocampus - an independent network of family businesses where members mentor each other, conduct research and publish articles on succession & diversity matters. Here I like to focus on promoting the role of women in family business and the importance of mutual support across generations. I am also an investment manager with over a decade of experience in dealing with alternative investments. I first worked for Allianz Global Investors in Italy, then for PIMCO in Germany where I was in charge of institutional mandates. More recently I was appointed as Principal at Blu Family Office based in the UK where I was in charge of providing investment advice on alternative investments to UHNWIs and family businesses. I studied finance at Bocconi University. I am a qualified family officer, a member of CISI, CAIA & CFA.

**Eric Lohrer**, Head of
Healthcare Investments**,**
**Loreda Holdings**

Co-heading Loreda Holdings (Hansjörg Wyss Family Office) venture and buy-out activities since 2014), where he successfully developed the European investment activity. Various leadership roles at Johnson & Johnson DePuy Synthes in the US, Europe and Apac, mainly in Sales & Marketing (2004-2014). Operational track record at Johnson & Johnson DePuy Synthes includes various functional roles incl. turn-around of two businesses in Asia and US from negative growth to outperforming the market over multiple years and developing key hires into award winning performers Financial Services M&A at Credit Suisse First Boston, focusing on banks and asset managers (2000-2002). Board member in several private companies (e.g. Lima Corporate, Amazentis, Weytec Group).

---

**Tom Lileng**,
Managing Director,
**General Oriental**

Tom is a Managing Director at General Oriental Investments S.A., Geneva. Tom joined the firm in 2011 and oversees the Geneva office. Tom's responsibilities include portfolio management as well as overseeing the research and trading efforts for the firm. On the allocation side, Tom is the firm's Head of Alternative Investments, covering all alternative investment strategies but with a particular focus on credit and distressed opportunities. Prior to General Oriental Investments, Tom was a Portfolio Manager and Head of Research with Santander's Alternative Investments unit, initially based in New York and later Geneva. Prior to Santander, Tom was a Senior Investment Analyst with SPI Funds and a Business Analyst with UBS. Tom earned a Bachelor of Science (Finance, 1999) and Master of Business Administration (International Business, 2000) from Florida Atlantic University and has earned a series of Executive Course Certificates from Harvard Business School Online (2021-2022). Tom is a Norwegian citizen and speaks Norwegian, Swedish, Danish, English, French, and Portuguese. Cavamont Holdings was founded as an investment holding company by Sir James Goldsmith for the exclusive benefit of his family and professionally managed by General Oriental Investments S.A. Prior to his death in 1997, Sir James amassed a personal fortune estimated at $2.5B. He was known for identifying weak managements and great companies, taking them over, turning them around and reaping the profits. Sir James was outspoken in his opposition to the founding of the European Currency (also created The UK Referendum Party), but was supportive of a Europe of regions.

**Edmund Truell**, Co-Founder, **Truell Conservation Foundation**

'Edi' is Co-Founder of the Truell Conservation Foundation which supports conservation projects worldwide; ViroCell Biologics a CDMO manufacturing viral vectors and gene-modified cells; and provides bursaries for children of HM Armed Forces veterans. He co-founded Pension SuperFund offering a safe and affordable way for businesses to keep their pension promises and co-founded Pension Insurance Corporation, responsible for the largest ever UK corporate pension insurance buyout. He is involved in other projects including: Atlantic SuperConnection to link Iceland to the UK via an HVDC cable to import 1.8GW of hydroelectricity and Health Destinations at Evolène in Switzerland, a project that combines a medical centre with exquisite alpine accommodation.

---

**Julia Balandina Jaquier**, Founder, **KATALYST, JBJ Consult**

Julia is a recognized impact investment expert and a trusted advisor to some of the leading global families of wealth and their Family Offices. With over 20 years of hands-on experience in impact finance and a passion for supporting market-based solutions to global challenges, Julia has facilitated the development and implementation of a broad range of mission-driven investment programs and funds for private, institutional, and sovereign investors. Julia is the founder of JBJ Consult, an independent impact investment advisory boutique, and of KATALYST, a capacity-building program for families of wealth. She is the author of two books on impact investment, an award-winning lecturer at major business schools and universities, and a member of the (Advisory) Boards of SIFEM (Swiss Development Finance Institution), Unilever, FORE Partnership, and toniic 100. She started her career at McKinsey in 1993 and subsequently held senior positions at ABB Financial Services and AIG Global Investment Group, where she managed the European direct private equity business and pioneered and led a USD 450m impact investment fund.

**Zaid Al-Qaimi**, Chief
Investment Officer,
**Kimera**

Zaid Al-Qaimi is the CIO at Kimera. Since January 2017, Zaid established an institutional standard infrastructure, including a team of talented individuals, to support the execution of the mandate. He has a large global network of contacts across the investment ecosystem, which has helped Kimera secure access to premium transactions. Leveraging this network, Kimera maintains a healthy pipeline of opportunities throughout the year and invests across the life cycle of companies, from late seed stage to public equity. Private investments are made on both a direct basis and through funds whilst the public equity and bonds portfolios are managed internally.

**Dr. Maria Specogna**,
Lead PM Kieger
Sustainable Healthcare
Fund, **Kieger AG**

Maria Specogna is Portfolio Manager in the Healthcare team. She manages Healthcare equity funds focused on sustainability (lead manager), thematic impact and blue-chip stocks. She is Advisor to Sustainable Investing and a member of the Management Committee. She has 20 years of experience in the financial industry, of which 16 in the field of sustainable investments. Prior to joining Kieger, she was responsible for Healthcare investments at Vontobel Asset Management. Before that, she co-developed and implemented ESG-integration strategies for equity analysis at both Vontobel Asset Management and Swiss Re, significantly improving their performance track-record. During the 6 years prior to her move to Swiss Re in 2007, she worked for Credit Suisse Private Bank, where she was responsible for Healthcare and Chemicals research. Her early professional years, following her studies, were spent as research scientist at the Institute of Physiology of the University of Zurich and as Laboratory Head at Givaudan. Maria studied Biochemistry and holds a PhD from the University of Zurich. She also obtained the Swiss Financial Analyst certification delivered by AZEK (Swiss Training Centre for Investment Professionals).

**Dominik von Eynern**,
Founding Member,
**Family Hippocampus**

Dominik comes from a business family, now in its 5th generation and is founding member of Family Hippocampus, a peer-group driven think & do tank focusing on social dynamics in business families. He holds a BSc in Economics and a MSc in finance, worked in the international investment banking industry and co-founded a family office. His research is inspired by insights from cognitive neuroscience, behavioural economics and complex system theory.

**Philip Falzon Sant Manduca**, CEO,
**Titanium Capital Investments Ltd**

Philip Falzon Sant Manduca, a UK citizen, is a highly experienced private equity and venture capital investor within one of the largest single family offices in the UK, with extensive seed capital small and micro capital business investment and corporate board level management experience. Philip has over 25 years of investor and business executive experience with a proven track record of successfully building and managing profitable investments and managing money. He founded and was the Managing Partner of Titanium Capital in 2001, a successful private equity and venture capital family office investment business based in London which initially focused on traditional investment funds, on behalf of Family Offices and HNW clients, with a particular focus on public and private markets including investments in emerging markets. He established the corporate investment strategy, and managed a \$300m SME fund and a \$650m venture capital fund. Assets reached more than \$1bn by 2007. The business was successfully sold in two parts to two investment banks in mid-2007. Philip established a new Titanium Capital Investments Ltd in 2012, based in the UK, Africa and Asia, on behalf of a large private family, to invest in the global real estate, healthcare, energy, commodity and consumer sectors. Philip invested in novel medical devices and drug treatment therapies in neuro oncology including convection enhanced delivery of drugs and focused ultrasound to allow drugs access directly to the brain to treat brain borne disease in children and Parkinson's disease in adults. Investments in the sector expanded vertically into the manufacturing and distribution of medical devices in the UK, EU and China for testing and self -testing for contamination from viruses and other diseases. Prior to 2001, Philip was Head of International Asset Management of Dexia Asset Management, with responsibility to build an international (non-US) asset management business. He constructed the distribution network, in Europe, Japan, NJA and the Middle East. Previously he was the Chief Investment Officer and Partner at Eldon Capital / Sant Cassia Investments. He managed the investment management process and corporate expansion, including in emerging markets. Philip spent the early part of his career at the world's leading investment banks (Daiwa Securities, Kidder Peabody and Merrill Lynch in senior roles in the financial markets. Philip appeared regularly in the media (CNBC, Bloomberg TV and CNN) and at major investment conferences in the UK, EU and USA.

**Neha Tanna**, Partner, Head of Life Sciences & Health, **Ordway Selections**

Neha is a medical doctor by training. She transitioned into the Life Sciences Industry where she spent a number of years across multiple sectors. After completing an MBA, Neha worked in a couple of start ups helping them to grow before moving full time into Venture Capital. She was part of the executive team at a US and EU VC fund, where she led the growth of the fund, led over 25 investments and built out the EU presence. Neha also holds multiple advisory roles aiding the investment eco- system for Life Sciences and Health Across multiple geographies.

**Harriet Browning**, Lead Solutions Sales & Business Developer EMEA, **ConsenSys**

Harriet Browning is the Lead for Global Ecosystem Business Development at ConsenSys, a leading blockchain software company building the decentralised web, where she engages with Crypto Institutions and Web3 native organizations, to scale and drive adoption of blockchain and digital assets. She cares deeply about fostering innovation in Web3 and is an active mentor for the Techstars accelerator for start ups in the space. Prior to joining Consensys, Harriet spent 12+ yrs working in Capital Markets in Derivative Sales, Trading and Structuring divisions at leading global Investment Banks (Bank of America Merrill Lynch, Morgan Stanley, Credit Suisse and Barclays), working closely with some of the worlds largest Institutional clients, Pensions, Endowments, Asset Managers and Hedge funds, to implement portfolio solutions for hedging, collateral management, de-risking and active/passive quantitive and systematic risk premia strategies. She has also previously held the CFA designation.

**Katalin Gallyas**,
Managing Director,
**c*funds**

Katalin Gallyas is the Managing Director of c*funds, an Amsterdam-based, boutique, globally active fund placement agency founded in 2018 focusing on raising capital for alternative investment funds with a typical fund size between €100m – €1b (VC, growth, buyout, and hedge funds). Katalin has over 16 years of experience as a fund placement agent and previous institutional fundraiser (EIF/ EIC). c*funds was founded with the aim to disrupt the traditional “old-boys network” Private Equity industry with a fresh and highly transactional model. c*funds represents a truly entrepreneurial, boutique approach to fund placements. The team consists of 13 investment professionals, a female-led, international team. Currently managing 500 qualified LP relations (North EU, US, SEA focus) ranging from institutionals to family 'off the radar' offices. c*funds also provides a strong market advisory for fund managers before entering the market.

**Alan R. Christensen**
**CFA**, President, **Fayez Sarofim & Co.**

Alan R. Christensen is the President and Head of Investment Risk at Fayez Sarofim & Co. and a member of the Fayez Sarofim & Co.’s Executive and Investment Committees. In addition to overseeing the Firm’s marketing, client service, operations and technology initiatives, Mr. Christensen is a co-manager of the mutual funds that Fayez Sarofim & Co. manages for BNY Mellon. He is also a portfolio manager for a variety of institutional and high net worth clients. Mr. Christensen joined the Firm in 2005 as an Associate. Over the years, areas of research of responsibility have included companies in the technology and industrials sectors. Mr. Christensen received a M.B.A. with Distinction from Cornell University in 2005, where he was a Park Fellow and a B.A. in Economics and History from Washington & Lee University in 1995, where he graduated cum laude. Prior to joining Fayez Sarofim & Co., he was employed with Alvarez & Marsal as a Director and Accenture as a Senior Manager in Capital Markets. Mr. Christensen is a graduate of the Center for Houston’s Future Leadership Forum and currently serves as a member of Annunciation Orthodox School Board of Trustees and is a member of YPO (Young President’s Organization.)

**Ndiawar Sar**, Investor &
COO, **Forestay Capital**

Ndiawar has been a long-time collaborator to the Bertarelli family holding various corporate responsibilities at Serono in finance and information technology. An avid technologist, Ndiawar nurtures his interest in digital innovation as an investor but also as Forestay's COO. Born in Senegal and raised in Geneva, Ndiawar has worked in Switzerland, USA and Germany. When not working, Ndiawar enjoys relaxing in Geneva due to its cosmopolitanism and closeness to nature. He can regularly be seen on his bike heading to a jazz concert or playing football with his young son.

**Urban Fritsche**, Lead PM
Kieger Impact Healthcare
Fund, **Kieger AG**

Urban Fritsche is Portfolio Manager in the Healthcare team. He co-manages Healthcare equity funds focused on thematic impact (lead manager), sustainability and blue-chip stocks. He is a member of the Management Committee. He has worked in the financial industry for many years, focusing primarily on the Pharmaceutical sector. Before joining Kieger, he worked for BZ Bank in Wollerau as sell-side analyst covering the Pharmaceutical, MedTech and Chemical sectors. In the earlier part of his career, he was brand manager for knee implants at Zimmer Biomet in Winterthur and, before that, project manager at Prionics (now Thermo Fisher Scientific) in Zurich. Urban studied Business Administration at the University of St. Gallen. He also holds a Master of Science in Biotechnology from the Technical University of Zurich.

**Dr. Ola Brown**,
Founder, **Flying Doctors Healthcare Investment Company**

Dr. Ola Brown is a medical physician, an entrepreneur, an investor in the PE/VC space for about 8years with over 20 deals and 2 exits. She is the founder of Flying Doctors Healthcare Investment Company (FDHIC), a company that invests in early-stage startup companies within the HealthTech and fintech sector as well as healthcare Infrastructure. The value of companies in FDHIC's technology portfolio is $450m. She holds a bachelor's degree in Medicine and Surgery and Masters in Economics and Finance. She aims to start her PhD in Finance and Economics in October. She is currently raising her 4th Venture Capital fund.

**Andreas Georgiadis**,
Chairman, CEO, Owner,
**Genico Family Office AG**

Through my width and longterm experience in M&A- Finance our own Family Office focussed from the beginning in investing direct in Swiss SME companies. After sharpened the profile and methods at the beginning to targeting the right companies and branches, we succeded to create a unique business model with tremendous and sustainable profits over the last decade. After building up a Swiss equity environment of over 20 companies all over Switzerland with yearly recurring high cash flows, the family committee decided to start to invest in real estate and asset management to relocate assets to a certain diversity. In the next 5-10 years the goal has been defined to secure the own family succession plan. Two of my three kids (Chiara (24) and Anna (20)) have started to join and work on common projects at Genico, even if they are still in the process of their studies at the HSG in St. Gallen (Master Bank & Finance) and the University in Zuerich (Bachelor Economics and IT).

**Yves Choueifaty**,
President & CIO,
**TOBAM**

TOBAM has been multi-awarded over the years, and Yves Choueifaty has notably been recognized as “Chief Investment Officer of the Year” in 2015 (Funds Europe) and “Asset Management Leader of the Year” in France in 2016 (AGEFI). As one of the pioneers of the smart beta movement, Yves Choueifaty is a frequent speaker at conferences and is a member of The 300 Club (23 members throughout the world), whose mission is to raise awareness about the potential impact of current market thinking and behaviors. Mr Choueifaty graduated in 1992 from ENSAE (leading French Engineering School) in Statistics, Actuarial studies, Finance, and Artificial Intelligence. Mathematician and Former CEO of Credit Lyonnais Asset Management (“CLAM”, AUM €70B). Having spent over 10 years with CLAM in diverse senior roles (CIO, Head of Financial Engineering and Quantitative Investment Management), Mr Choueifaty left in 2004, went back to Mathematics research and founded the Maximum Diversification ® approach and TOBAM in 2005. Mr Choueifaty is also a committed entrepreneur on human rights and climate change challenges. He has several external commitments: he is the president of the advisory board of WeNow, a “climate neutral now” champion endorsed by the United Nations. He is also a board member of the Saint-Joseph University foundation in Lebanon, a board member of the RDCL (Association of Lebanese businessmen and women united by a common vision for the Lebanese economy), and Yves Choueifaty is a member of the Paris Committee of the NGO Human Rights Watch since 2019.

**Sophia Shluger**,
Managing Director,
UK, **Amber Group**

Sophia Shluger is the Managing Director for Amber Group in the UK, responsible for institutional expansion both in the UK and across EMEA. A financial services executive and global business development professional, she has 10+ years of track record and deal-making experience from Goldman Sachs, XP, Santander Investment Securities and American Express, among others. Before transitioning into digital assets, she worked in an investment advisory capacity within FX, equities, equity derivatives and private debt, with a focus on Latin America and responsibility for building out new commercial relationships and investment businesses.

**Jochen Wermuth**,
Principal & Founder,
**Wermuth Asset Management GmbH**

Investment committee member of Germany's new €24bn SWF "KENFO". Environmental impact investor with 20 years of investment experience across all asset classes. Founder and Principal of family office and investment adviser Wermuth Asset Management GmbH, Founder of Greater Europe Fund, Green Growth Funds, Climate Endowment. Previously Director at Deutsche Bank, EU & World Bank-financed economic advisor MA in Economics, BA Mathematics from Brown University with honors and magna cum laude passed D.Phil. qualifying exams, Oxford University.

---

**Mike Veling**, Founder and Managing Partner,
**Aqua-Spark**

A lifelong entrepreneur, Mike has spent decades jumpstarting a range of successful businesses. Among other ventures, he co-founded Connexie, which has helped catalyze a professional employment industry across the Netherlands. In addition, as a very active investor, he has helped build tens of different companies in a vast array of sectors, from software to fintech to organic farming. He believes in the potential for business to create durable solutions to complex world problems. In 2011 he started dreaming up a way to transform the aquaculture industry through the right type of investment and in 2014 Mike officially launched Aqua-Spark, the first fund dedicated to sustainable aquaculture. With Aqua-Spark Mike sits on the Boards of Calysta, Proteon, Protix, Sogn Aqua, Hatch Blue and Fisher Piscultura, where his focus is growth, strategy, and furthering sustainability.

**Stephen Lile**,
Managing Partner,
**Oxbridge Ventures**

Cambridge PhD (2022) and Emmy Award winning media technologist, founder, executive and investor with 20-year history of building companies on a global scale and getting exits. Stephen is also the co-author of Science Denial Impact: People, Organizations, and Institutions (Stanford University Press due January 2023), guest lecturer at Cambridge Judge Business School, and mentor/instructor at Cambridge University Master in Entrepreneurship program.

---

**Dr. Sally Eaves**, Lead Chaur, **Global Cyber Trust, GFCYBER**

Dr. Sally Eaves is Senior Policy Advisor and Chair of Cyber Trust for the Global Foundation of Cyber Studies and Research, and CEO of Aspirational Futures which enhances inclusion, sustainability and diversity in education and technology. Described as the 'torchbearer for ethical tech', she was the inaugural recipient of the Frontier Technology and Social Impact award, presented at the United Nations and works across sectors to enable shared value business and societal innovation across the world. A highly experienced Chief Technology Officer, Professor in Advanced Technology and FinTech and Global Strategic Advisor, Sally is an award winning International Author, Advisor, Researcher and Keynote Speaker on Digital Transformation (Blockchain, AI, Security, IoT, 5G, Cloud) alongside Culture, Skills, Sustainability, Decentralised Finance and SDGs Impact. She also continually achieves top 10 globally leading rankings for thought leadership influence across all advanced technology disciplines, digital transformation, decentralised finance, future of work and social innovation and appears regularly for commentary across TV, Online and Radio media outlets. Sally is the editor of Cyber Insights, develops bleeding edge courses across the data and technology discipline spectrum and is publishing her new book 'Tech For Good' in 2022.

**Jeff Cyr**, CEO & Managing Partner, **Raven Indigenous Capital Partners and the Raven Indigenous Impact Foundation**

Jeff Cyr Jeff is mixed heritage, Métis and European and hails from the White Horse Plains area of Southern Manitoba, Canada, the traditional Buffalo Hunt staging grounds. For nearly 25 years, he has provided strategic leadership for Indigenous, not-for-profit, for-profit and government organizations. Jeff is the Co-Founder and Managing Partner of Raven Indigenous Capital Partners (RICP) and the CEO of the Raven Indigenous Impact Foundation (RIIF), working on unceded Algonquin lands in what is now known as Ottawa, Ontario. Before founding Raven, Jeff was Vice-President at Grand Challenges Canada, a leading global innovation platform, Executive Director of the National Association of Indigenous Friendship Centres, the world's largest network of Indigenous Urban service providers and held key roles within the Government of Canada. He is a guest lecturer at Saïd Business School at Oxford University and a past professor at Carleton University. Currently on the Advisory Council of Royal Roads University Business School and member of the Finance and Investment Committee of the Indigenous Peoples Resiliency Fund. Previously, Jeff was Chair of the Canadian Institute of Health Research Indigenous Advisory Board and member of the Canadian Council for the Social Determinants of Health.

---

**Khalid Alsubeaei**, Member of the Board, **Thara Investments**

Experienced specialist with a demonstrated history of working in management consulting and investment management fields. Skilled in strategic planning, performance management, financial analysis. Strong professional with a bachelor degree in economics from Syracuse University, USA. Presently working in buy-side research at SNB Capital. Prior to joining SNB, I managed to gain hand-on experience in founding different companies in the investment and medical sectors.

**Martin Burgherr**,
Chief Client Officer,
**Sygnum Bank AG**

Martin is the Chief Client Officer of Sygnum Bank AG, the worlds first digital asset bank. During the licensing process he held the Chief Risk Officer role within Sygnum. Before Sygnum, he worked for KPMG and Deloitte as a qualified auditor and advisor for the Financial Services industry. He started his career as a sales within UBS investment bank.

**Maximilian Gehrmann**, 4th
Generation Family Member,
**Gehrmann Capital**

Max, lawyer, father of a 2 month year old daughter, is originating from a 16th century Prussian family. His ancestors managed to grow wealth and loose it - over and over again. It took from him 8 years to restructure and consolidate the entire family heritage. After exploring Europe by motorbike, studies and working in a befriended MFO, he started all over again. In 2016 he found his path with equity, debt and mezzanine fundings. Since then, he has accompanied industrial projects, real estate developments and start-ups. He enjoys motorbiking, classic cars and photography and lives in Germany and Switzerland.

## Day 1 - 20th June 2022

**08:00** Registration, Breakfast, Networking

**09:00** **Chairman Welcome Remarks**
**Baldwin Berges**, Development & Investment Strategist

**09:10** Panel Discussion: **Managing Family Dynamics: Actionable Solutions to the Growing Complexities of Family Businesses**

**Moderator:**
**Dominik Von Eynern**, Founding Member, **Family Hippocampus**
**Panellists:**
**Doris Sommavilla**, Director, **Stonehage Fleming**
**Andreas Georgiadis**, Chairman, CEO, Owner, **Genico Family Office AG**
**Khalid Alsubeaei**, Member of the Board, **Thara Investments**

- What challenges are family businesses currently facing? A look at generational and cultural division, evolving family structures and cross-border legal and tax conflicts.
- How can these challenges be overcome? Understanding the role of external advisors.
- Strategies for building a robust and effective governance structure. Do the relationships between principals, family officers and the next-gen need a new narrative?

**09.50** **Keynote Presentation: Governance - what's it worth?**
**Sir James Wates CBE**, Chairman, **Wates Group**

**10:30** Networking Break / One to One Meetings

**11:00** Panel Discussion: **Deploying Capital for Social & Environmental Good: Making sense of Impact Investing**

**Moderator:**
**Julia Balandina Jaquier**, Founder, **KATALYST, JBJ Consult**
**Panellists:**
**Edmund Truell**, Founder, **Truell Conservation Foundation**
**Cédric Lombard**, Chairman, **Impact Finance**
**Jeff Cyr**, CEO and Managing Partner, **Raven Indigenous Capital Partners and the Raven Indigenous Impact Foundation**
**Dr. Maria Specogna**, Lead PM Kieger Sustainable Healthcare Fund, **Kieger AG**

- What impact investing really is and how it differs from sustainable/ESG investing and philanthropy?
- Is it a new asset class and what options are available for family offices?
- How to avoid green-washing and manage impact?
- Are attractive financial returns possible?
- What attracts families of wealth to impact investing? What is the role of Family Offices and who drives these initiatives within the families?
- Is Impact Investing a Hype or a Powerful Investment Approach?

**11.40** **Keynote Presentation: Transforming aquaculture through scaling novel solutions**
**Mike Veling**, Founder and Managing Partner, **Aqua-Spark**

**12.00** **Keynote Presentation: The Green Industrial Revolution**
**Jochen Wermuth**, Founder & Principal, **Wermuth Asset Management GmbH**

**12.20** Networking Lunch

**14.00** Panel Discussion: **Family Office Venture Investing**

**Moderator:**
**Katalin Gallyas**, Managing Director, **c*funds**
**Panellists:**
**Dr. Adil Alzarooni**, CEO, **Al Zarooni Emirates Investments**
**Hershel Mehta**, Principal, **Mehta Ventures Family Office**
**Maximilian Gehrmann**, 4th Generation Family Member, **Gehrmann Capital**

- Direct vs. fund investments.
- VC deal-sourcing. How to access the best deals?
- Which sectors and markets should investors be paying close attention to?
- Building strong teams and executing on promises to founders.

**14.40** **Keynote Presentation: Why Family Offices will drive the next wave of impact-related investments into technology and healthcare?**
**Aaron Weaver**, Principal, **Apeiron Investment Group**

**15:00** Networking Break / One to One Meetings

**15:30** Roundtable Discussions

**Table 1: Investing in the world we want to live in - our approach in Healthcare**
**Dr. Maria Specogna**, Lead PM Kieger Sustainable Healthcare Fund, **Kieger AG**

**Table 2: Metaverse and Industry 4.0. are changing our lives forever. What are they and where to invest?**
**Stephen Lile**, Managing Partner, **Oxbridge Ventures**

**Table 3: Sarofim: 60 years of Global Investing**
**Alan R. Christensen**, President, **Fayez Sarofim & Co.**

**Table 4: Phytocann - A Leading Profitable European CBD Company**
**Alexandre-Henri Lacarré**, Chairman & CEO, **Phytocann**

**16:30** Networking Break / One to One Meetings

**17.00** **Keynote Presentation: Moving on to Crypto?**
**Yves Choueifaty**, President and CIO, **TOBAM**

**17.20** Panel Discussion: **Digital Assets & Cryptocurrency. Building the Foundation for Widespread Institutional Adoption**

**Moderator:**
**Christophe Roehri**, Deputy CEO, **TOBAM**
**Panellists:**
**H.S.H Princess Alessandra Silvestri von Bismarck**, Angel Investor, **Bismarck Family Office**
**Davide Tosetti**, Managing Director, **Tosetti Value - Il Family Office**
**Martin Burgherr**, Chief Client Officer, **Sygnum Bank AG**
**Sophia Shluger**, Managing Director, UK, **Amber Group**

- How has the regulatory framework for digital assets changed?
- The importance of trusted custody solutions and ETF's.
- Environmental considerations. Crypto 'mining' and the move from coal to renewable energy sources.
- What impact will digital assets and the emerging decentralised finance market have on the traditional financial services market?

**18.00** **Keynote Presentation: The DeFi and Web3 Opportunity for Funds and Family Offices**
**Harriet Browning**, Lead Solutions Sales & Business Developer EMEA, **ConsenSys**

**18.20** Break Before Dinner

**19.30** Cocktail Reception & Gala Dinner on La Terrasse du Petit Palais

## Day 2 - 21st June 2022

**08:00** Registration, Breakfast, Networking

**09:00** Panel Discussion: **Real Estate of Tomorrow**

**Moderator:**
**H.S.H Prince Carl Eduard von Bismarck**, CEO, **Bismarck Family Office**
**Panellists:**
**Tom Lileng**, Managing Director, **General Oriental**
**Andreas Woitzik**, Principal, **Prof. Lohse Treuhand SFO**

- What does the future hold for real estate investment?
- Safe haven in a turbulent world, or just an illiquid asset in a world searching for value & yield?
- Re-purposing of Real Estate within the portfolio. Strategies for Family Offices.
- ESG, locality and the responsibilities of Real Estate investors in boosting urban wellbeing.

**09.40** Panel Discussion: **Healthcare Investments as a Family Office: Identifying the Opportunities**

**Moderator:**
**David Pinkerton**, CEO/CIO, **Alpha Leonis Partners AG**
**Panellists:**
**Eric Lohrer**, Head of Healthcare Investments, **Loreda Holdings (Hansjörg Wyss Family Office)**
**Neha Tanna**, Partner, Head of Life Sciences & Health, **Ordway Selections**
**Urban Fritsche**, Lead PM Kieger Impact Healthcare Fund, **Kieger AG**

- Which subsets and markets hold the most promise for investors?
- A look at the major themes driving healthcare investment.
- How changes in the sector are effecting the broader investment landscape.
- What new opportunities are opening up for Family Office investors?

**10:20** **Keynote Presentation: Healthcare Investments: New Opportunities, New Challenges**
**Dr. Ola Brown**, Founder, **Flying Doctors Healthcare Investment Company**

**10:40** Networking Break / One to One Meetings

**11:00** **Fireside Chat: The Future of Human Capital Management with or without Technology?**
**Guillaume Sarkozy**, Founding Member & Chairman, **GSNB Conseil**

**11:20** Panel Discussion: **Tech Mega Trends**

**Moderator:**
**Stephen Lile**, Managing Partner, **Oxbridge Ventures**
**Panellists:**
**Gregor Von Dem Knesebeck**, Managing Partner, **Blue Future Partners**
**Ndiawar Sar**, Investor & COO, **Forestay Capital**
**Dr. Sally Eaves**, Chair, **Global Cyber Trust, GFCYBER**

- What are the tech trends that will change the world?
- Accessing the right private market deals. How to overcome the challenges?
- When does it makes sense to be a contrarian investor in technology?
- Fund or Direct Investments as a Family Office?

**12:00** **Chairman Closing Remarks**
**Baldwin Berges**, Development & Investment Strategist

**12.30** Closing Networking Lunch

### The Venue

Surrounded by the soaring Alps and nestled along the shores of sparkling Lake Geneva, **Fairmont Le Montreux Palace** has delighted visitors for over a century with its Belle-Époque architecture boasting 236 rooms and suites and a reputation for impeccable hospitality stretching back to its founding in 1906.


### Networking Functions

Networking opportunities are available throughout the event. In addition to formal one-to-one meeting arrangements, participants can enjoy the more relaxed networking lunches, cocktail reception and gala dinner, all hosted in beautiful entertainment spaces within the Fairmont Le Montreux Palace.

### Registration

Participation is by invitation-only. If you have been approached by a member of the Connect Group team, please express your interest in the event to them directly. Alternatively, please reach out to us at info@connectgroup.global

*All requests for attendance are reviewed and subject to board approval.*

## About Connect Group

Connect Group events bring together global corporate leaders producing compelling conversations, promoting high-level networking and sparking positive business ventures. We follow three guiding principles; **we educate** our network through the cutting-edge, frontier ideas and insights delivered by our world-class speakers; **we inform** our network, by releasing the latest in industry news and insights and **we connect** our network, by bringing together industry leaders and promoting high-level networking.


**Connect Partners Limited**
71-75 Shelton Street, London, WC2H 9JQ, UK
+44 (0) 208 144 1422
info@connectgroup.global
www.connectgroup.global


connectgroup