

# World Family Office Forum | Europe

16-17 June 2025

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.





# The Speakers

Each edition of the event attracts prestigious speakers from within the industry. Here are some of the world class names who have contributed to previous events:



**Guillaume Sarkozy**  
Founding Member & Chairman  
GSNB Conseil (SFO)



**Giorgiana Notarbartolo**  
Impact Investor  
PFC Family Office (SFO)



**Sir James Wates CBE**  
Former Chairman  
Wates Group (SFO)



**Sally Tennant OBE**  
Founder  
Acorn Capital Advisors



**Christina-Anne Kyosti**  
Chairwoman  
ViaTalanta Group (SFO)



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



**Henrietta Gourlay**  
Investment Director  
Grosvenor Family Office (SFO)



**Frédéric de Mévius**  
Executive Chairman & Managing  
Partner, Planet First Partners



**Rodolfo De Benedetti**  
Chairman, CIR Group



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



**Carl-Eduard, Prince of Bismarck**  
CEO  
Bismarck Family Office (SFO)



**Angela De Giacomo**  
Chief Investment Officer  
Evalue Family Office (SFO)



**Ariane Spandow**  
Chair Board of Directors,  
Spabogruppen & Amesto Group



**Davide Tosetti**  
Managing Director  
Tosetti Value - II Family Office  
(MFO)



**Alexandre Mars**  
Entrepreneur and Philanthropist



**Simon Tandy**  
Chief Investment Officer  
Areef Investments (SFO)



**Lars Seier Christensen**  
Founder and CEO  
Seier Capital (SFO)



**Isabel Azoulay**  
CEO  
Front Row Family Office



**Jonathan Ordway Fackelmayer**  
Chairman and Managing Partner  
Ordway Selections (SFO)



**Paulina Jakubec**  
Chairman, Board of Directors  
IDC Holding

# Mon 16 Jun

08:00 - 09:00

## Registration & Light Breakfast

09:00 - 09:10

## Chairman Welcome Remarks

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. Speakers will share real insights on balancing tradition with innovation, professionalizing operations, and ensuring the long-term success and impact of the family enterprise.

09:50 - 10:10 | Fireside Chat

## Next-Gen Entrepreneurs: Balancing Family Expectations With Personal Ambition

In this session, a next-gen family member shares their experience navigating the challenge of balancing family expectations with the desire to pursue independent entrepreneurial ventures, and how they carve their own path while maintaining respect for the family legacy.

10:10 - 10:50 | Keynote Presentation

## Global Investment Trends: Preparing for Tomorrow's Opportunities

This session will explore how family offices can navigate evolving geopolitical risks, balance private and public market investments, optimize alternative assets, and implement effective risk management strategies to ensure resilient, diversified portfolios in an increasingly volatile and uncertain global landscape.

10:50 - 11:10 | Keynote Presentation

## The Role of ETFs and Passive Investments in a Family Office Portfolio

Exploring how family offices can use exchange-traded funds (ETFs) and passive investment strategies to gain diversified exposure while minimizing costs and maintaining agility.

11:10 - 11:30

## Networking Break / One-To-One Meetings

11:30 - 12:30

## Roundtable Discussions

- Table 1:** Public Markets in a High-Rate World
- Table 2:** European Private Equity: Still a Strong Bet?
- Table 3:** Private Debt: Finding Yield and Managing Risk
- Table 4:** Asia's Venture Boom: How to Access the Best Deals

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.

Panelists:

[Anjel Noorbakhsh Ashman](#), Investment Principal, [Lombos \(Family Office\)](#)

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 | Fireside Chat

## The Power of Networks & Co-Investing

Beyond capital, how can family offices leverage their networks to access top-tier private deals, reduce risk, and drive returns?

16:00 - 16:40 | Panel Discussion

## The Digital Asset Supercycle: Are We at the Start of a New Bull Run?

This session explores whether digital assets are entering a new bull cycle, analysing macroeconomic drivers, institutional capital flows, regulatory shifts, and key sectors – such as DeFi, tokenization, and infrastructure.

16:40 - 17:00 | Keynote Presentation

## Digital Asset Custody and Security: Institutional-Grade Solutions for Family Offices

Exploring the evolving landscape of crypto custody, from self-custody solutions to regulated institutional-grade custodians, and best practices for mitigating counterparty risk.

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.

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: Should Family Offices Be Looking Abroad?

As macroeconomic conditions evolve, family offices must reassess their approach to international real estate investing. With rising interest rates, shifting capital flows, regulatory changes, and geopolitical uncertainty, does cross-border real estate still offer compelling opportunities? This session will explore key markets, asset classes, and structural considerations for global real estate investments, helping families weigh the risks and rewards of expanding their property portfolios beyond their home markets.

11:10 - 11:50 | 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.

11:50 - 12:00

## Closing Thoughts from the Summit Chair

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

12:00 - 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.

# Let's Connect

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