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World Family Office Forum | Europe

3-4 June 2024
Fairmont Le Montreux Palace Hotel,
Montreux, Switzerland

The Event

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

Overview

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

Over two days, delegates have the opportunity to:

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

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

High-level

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

Exclusive

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

Mon 3 Jun

08:00 - 09:00
Registration & Light Breakfast

09:00 - 09:10
Chairman Welcome Remarks

09:10 - 10:00 | Panel Discussion
Legacy & Leadership: Navigating the Nuances of Family Business in Modern Times

Moderator:
Sally Woodford, Independent Strategic Advisor
Panellists:
Ulrich Schmid-Maybach, Founder & President, **The Wilhelm & Karl Maybach Foundation**
Ariane Spandow, Chair Board of Directors, **Spabogruppen & Amesto Group**
Paulina Jakubec, Chairman, Board of Directors, **IDC Holding**

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

10:00 - 10:20 | Fireside Chat
Next Generation Empowerment

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

10:20 - 11:00 | Panel Discussion
Investment Strategies for the Modern Family Office: Adapting to Global Economic and Political Shifts

Moderator:
Walter Gontarek, CEO & Chairman, **Channel Capital**
Panellists:
Rodolfo De Benedetti, Partner, **Decalia SA**
Henrietta Gourlay, Investment Director, **Grosvenor**
Davide Tosetti, Managing Director, **Tosetti Value - Il Family Office**
Simon Tandy, Chief Investment Officer, **Areef Investments**

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

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

11:30 - 12:30
Roundtable Discussions

Table 1: Private Debt: A Portfolio Stabilizer or Not?
Walter Gontarek, CEO & Chairman, **Channel Capital**

Table 2: How to Express Asia in a Global Portfolio
Vanessa Xu, CIO & Co-Founder, **VS Partners**

Table 3: Championing Diversity in Finance: Empowering Female Fund Managers, Investors, and Founders
Christina Anne Kyosti, Family Principal & Chairwoman, **ViaTalenta Group**

12:30 - 14:00
Networking Lunch

14:00 - 14:40 | Panel Discussion
Venture Capital: Innovation, Entrepreneurship, and Economic Growth

Moderator:
Jeremy Sparrow, Partner, **IDC Ventures**
Panellists:
Isabel Azoulay, CEO, **Front Row Family Office**
Ariel Barack, Senior Partner & CEO, **Ordway Selections**
Isabelle Freidheim, Founder & Managing Partner, **Athena Capital**

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

14:40 - 15:00 | Keynote Presentation
Public Equities as a Cornerstone of a Family Portfolio

Andrew Brenton, CEO & Co-Founder, **Turtle Creek Asset Management**

15:00 - 15:20 | Keynote Presentation
Steady Performance: Navigating Low Volatility and Diversification for Sustained Growth

Bas Kooijman, CEO, **DHF Capital**

15:20 - 16:00
Networking Break / One-To-One Meetings

16:00 - 16:40 | Panel Discussion
A Family Office Guide to Digital Assets & Web3

Moderator:
Sandra Ro, CEO, **Global Blockchain Business Council**
Panellists:
Ian Morley, Chairman, **Wentworth Hall Family Office**
Lars Seier Christensen, Chairman and Founder, **Concordium**
Scott Schucht, Senior Manager - Sales & Distribution, **CoinShares**

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

16:40 - 17:00 | Keynote Presentation
SoleFamily: Giving Hope, Relieving Suffering and Making a Positive Impact in Bali
Robert Epstone, Co Founder, **Sole Family Bali Foundation**

17:00 - 17:40 | Panel Discussion
Beyond Giving: Innovating Philanthropy in the 21st Century

Moderator:
Christoph Courth, Global Head of Philanthropy Services, **Pictet**
Panellists:
Christina Anne Kyosti, Family Principal & Chairwoman, **ViaTalenta Group**
Alexandre Mars, Entrepreneur & Philanthropist

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

17:40 - 19:00
Networking Break / One-To-One Meetings

19:00 - 22:00
Networking Cocktail Reception & Gala Dinner at La Terrasse du Petit Palais with Special Entertainment

Tue 4 Jun

08:00 - 09:00
Networking Breakfast

09:00 - 09:30 | Keynote Presentation
Balancing Transformation, Tradition, and Reputation: Family Office Challenges and Opportunities in 2024

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

09:30 - 10:10 | Panel Discussion
Conscious Capital: Strategies for Effective Impact Investing

Moderator:
Mirjam Garzon, Founder & Managing Partner, **Impact Capital Advisory**
Panellists:
Dimple Sahni, Managing Director Multi-Asset Impact Investing, **Anthos Fund & Asset Management**
Ian McDonald, Head of Impact & Sustainability, **Vedra Partners**
Tenke Zoltani, Founder, **Better Finance**

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

10:10 - 10:30 | Keynote Presentation
Climate Change, Business Risks and Investment Opportunities

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

10:30 - 11:00
Networking Break / One-To-One Meetings

11:00 - 11:40 | Fireside Chat
High-End Luxury: Insights from Mabel Capital on Real Estate, Hotels, and Hospitality

Panellists:
Manuel Campos Guallar, Chairman & Owner, **Mabel Capital**
Philip Sauer, Managing Director of Real Estate & Hotels, **Mabel Capital**

Join Mabel Capital to learn about the strategic vision and growth that shaped their success in luxury markets. Discover trends and opportunities in high-end residential real estate, innovative hotel and hospitality management approaches, and analyze successful projects. Gain valuable insights into future market predictions and investment strategies tailored for family offices.

11:40 - 12:00 | Keynote Presentation
Smart Investing: Optimizing Investment Operations with Family Office Software

12:00 - 12:10
Closing Thoughts from the Summit Chair

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

12:10 - 14:00
Networking Lunch

Enjoy the closing lunch on the Terrasse du Petit Palais.

Rodolfo De Benedetti

Partner
Decalia SA

3rd June
10:20 - 11:00

Panel Discussion:

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

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

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

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

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

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

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

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

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

Sally Tennant OBE

Founder
Acorn Capital Advisers

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

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

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

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

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

4th June
09:00 - 09:30

Keynote Presentation:

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

Christina Anne Kyosti

Family Principal & Chairwoman
ViaTalenta Group

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

3rd June
17:00 - 17:40

Panel Discussion:

Beyond Giving: Innovating Philanthropy in the 21st Century

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Lars Seier Christensen

Chairman and Founder
Concordium

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

3rd June
16:00 - 16:40

Panel Discussion:

A Family Office Guide to Digital Assets & Web3

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Ariane Spandow

Chair Board of Directors
Spabogruppen & Amesto Group

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

3rd June
09:10 - 10:00

Panel Discussion:

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

3rd June
17:00 - 17:40

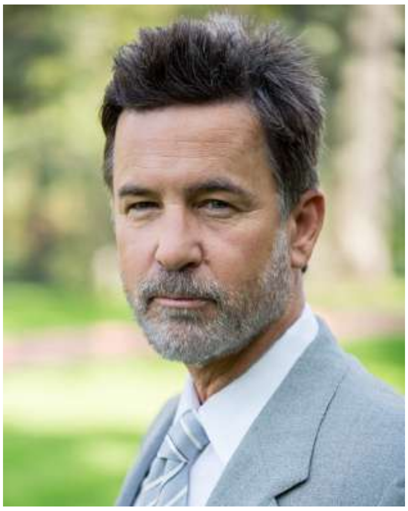
Panel Discussion:

Beyond Giving: Innovating Philanthropy in the 21st Century

Alexandre Mars

Entrepreneur & Philanthropist

Alexandre Mars began his career as an entrepreneur at the age of seventeen. Over the course of years of tireless work launching and developing successful startups, he sold two of his companies to Publicis and BlackBerry.
Nevertheless, creating tech ventures was never his end goal. His entrepreneurial successes afforded him the financial security to fuel the much larger social ambitions he had harbored since his youth: to be of use to society. That's why Alexandre decided to leverage his entrepreneurial skills, network, knowledge, wealth, and influence to scale his impact and contribute to a more just and fair society.
To foster that mission, he first created Epic, a global foundation that helps empower and protect children, youth, and our planet by bridging the gap between impactful nonprofits and individuals and businesses seeking to enact positive change. In 2019, the Harvard Kennedy School published a case study on Epic, highlighting its innovative new model for social impact.
A firm believer that the private sector also has a crucial role in making our society more just and sustainable, Mars founded blisce/, a leading B Corp investment firm committed to investing differently by reconciling economic, social, and environmental performance. Since its inception, blisce/ has invested in companies such as Spotify, Headspace, Pinterest or Too Good To Go.
True to his commitment to social justice, Alexandre also founded INFINITE, a social EdTech that supports students from underprivileged backgrounds in their access to the world's most renowned schools and universities and in their first steps into the professional world, through an innovative student loan offer. INFINITE's mission is to encourage the success of talented young people in order to contribute to the creation of a new generation of leaders, more representative of the richness of our society.
Mars' passion for sports and his commitment to greater social justice also led him to become an Ambassador and Board member of the Paris 2024 Olympic and Paralympic Games. He is actively contributing to the challenge of ensuring the social legacy of this unique event, beyond the competition itself.
He is also the host of the podcast PAUSE, in which he invites artists, business leaders, writers, entrepreneurs, athletes, and activists to share the secrets behind their professional and personal journeys.
Mars is the author of Giving: Purpose is the New Currency (HarperOne/HarperCollins, 2019), and Mission Possible: How to Build a Business for Our Times (Nicholas Brealey Publishing, 2022), from which he has developed a masterclass.
Mars has been named a Knight of the Legion of Honor, France's highest civilian award order, a "Top 50 Philanthropist of The Year" (Town & Country), one of "The 50 Most Influential French People" (Vanity Fair).
He practices krav-maga and long-distance running and has completed the Paris and New York marathons. He is married, has four children, and enjoys traveling the world with his family.



Ulrich Schmid-Maybach

Founder & President
The Wilhelm & Karl Maybach Foundation

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

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

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

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

3rd June
09:10 - 10:00

Panel Discussion:

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

Isabelle Freidheim

Founder & Managing Partner
Athena Capital

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

3rd June
14:00 - 14:40

Panel Discussion:

Venture Capital: Innovation, Entrepreneurship, and Economic Growth

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Isabel Azoulay

CEO
Front Row Family Office

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

3rd June
14:00 - 14:40

Panel Discussion:

Venture Capital: Innovation, Entrepreneurship, and Economic Growth

Davide Tosetti

Managing Director
Tosetti Value - 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.

3rd June
10:20 - 11:00

Panel Discussion:

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

Dimple Sahni

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

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

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

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

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

4th June
09:30 - 10:10

Panel Discussion:

Conscious Capital: Strategies for Effective Impact Investing

Manuel Campos Guallar

Chairman & Owner
Mabel Capital

Manuel Campos Guallar is Chairman and Owner of Mabel Capital. Manuel has been developing high end real estate residential projects for Mabel Capital for over 10 years. He´s widely regarded as the leading developer of luxury residential real estate in Spain. Through one of his companies, Mabel Hospitality, he has also developed in the past 10 years Hospitality projects in Spain, USA, Mexico and Middle East; he also co-owns a media production company creating shows for Netflix and producing one of Europe´s largest music festivals, Mad Cool (+300,000 attendants). Prior to launching his own private investment company, he worked in investment banking and private banking for 7 years in London and Madrid. Manuel holds an MBA from the University of Chicago and a Law and Finance degrees from IEB University (Madrid).

4th June
11:00 - 11:40

Fireside Chat:

High-End Luxury: Insights from Mabel Capital on Real Estate, Hotels, and Hospitality

Paulina Jakubec

Chairman, Board of Directors
IDC Holding

After earning a master's degree in international development from the London School of Economics, Paulina pursued her initial career as a public affairs consultant for private corporate clients, and later the British Financial Markets Regulator. Paulina later transitioned from politics towards business and finance by completing an executive certificate in managerial accounting at the LSE and another postgraduate certificate in Financial Strategy at the University of Oxford. She's been on the board of directors for two of her family's portfolio companies for several years now, and recently became the Board chairman for IDC Holding, the largest Slovak producer and distributor of confectionary and pastry products.

3rd June
09:10 - 10:00

Panel Discussion:

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

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Vanessa Xu

CIO & Co-Founder
VS Partners

Ms. Xu is co-founder, Executive Chairman, and Chief Investment Officer of VS Partners, a global asset allocator, serving global investors in a radically-changing world. With two decades 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, forming the foundation of VS Partners proprietary Asset Allocation as-a-service model. Ms. Xu was named the Most Powerful Woman in China by FORTUNE China in 2022. She has also been part of the Aspen Institute's community of thought leaders as a Fellow of the 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. Ms. Xu is a trusted voice, a keynote speaker and a regular guest and contributor for Bloomberg, FTChinese and several leading finance media in China.

3rd June
11:30 - 12:30

Roundtable Discussion:

How to Express Asia in a Global Portfolio

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Jeremy Sparrow

Partner
IDC Ventures

Jeremy is IDC Ventures' London-based Partner, bringing a wealth of leadership experience at the forefront of technology, consulting, and finance. He has served as the founder and CEO of Captego Aps, an AI software company in Denmark; the founder of Alexander Capital Management, a consultancy based in London; and the CEO of Renaissance Capital Asia, where he established and expanded operations across Asia, including offices in China and Hong Kong.

3rd June
14:00 - 14:40

Panel Discussion:

Venture Capital: Innovation, Entrepreneurship, and Economic Growth

Isabelle Freidheim

Founder & Managing Partner
Athena Capital

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

3rd June
14:00 - 14:40

Panel Discussion:

Venture Capital: Innovation, Entrepreneurship, and Economic Growth

Mirjam Garzon

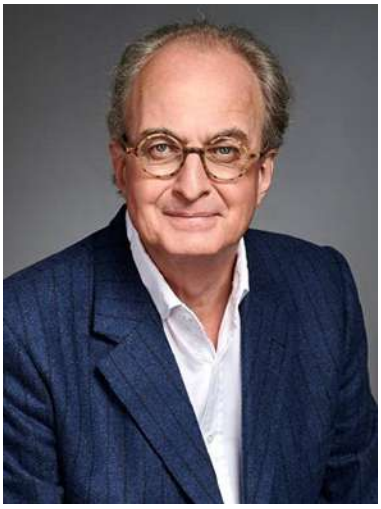
Founder & Managing Partner
Impact Capital Advisory

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

4th June
09:30 - 10:10

Panel Discussion:

Conscious Capital: Strategies for Effective Impact Investing



Frédéric de Mévius

Executive Chairman & Managing Partner
Planet First Partners

Frédéric's investment experience includes a decade in investment banking and 13 years on the board of Interbrew, now AB Inbev. In 1995, he founded Verlinvest, an evergreen consumer-focussed investment company with exceptional successes such as Oatly, Chewy and Valtech. He stepped down in 2019 and after investing in General Fusion, and, in 2020, in Polymateria, a company with the world's first proven technology for producing fully biodegradable plastics, he founded Planet First Partners, an evergreen investment platform that invests growth capital in companies aligned with the sustainability goals of the EU; the fund raised €450M in commitments. Planet First Partners has made several investments so far: Sunfire, a producer of electrolysers for green hydrogen, Submer, a provider of a liquid cooling technology for data centres, Nanogence, a provider of a cement additive that reduces the need for cement in concrete by 50% and Finn, a car subscription business aiming to develop the ownership of EVs. In 2014, he launched a new cold climate Chardonnay wine under the name of La Falize. He is a strong supporter of several educational projects, including Out of the Box (addressing school dropouts) Greater Share and Teach For All.

4th June
10:10 - 10:30

Keynote Presentation:

Climate Change, Business Risks and Investment Opportunities

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Sally Woodford

Independent Strategic Advisor

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

3rd June
09:10 - 10:00

Panel Discussion:

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

Simon Tandy

Chief Investment Officer
Areef Investments

Simon Tandy has spent the past 35 years as a long only diversified portfolio manager. Currently running a family office in Dubai, but travels extensively mostly towards Europe, Africa & Asia. After starting in London he spent 5 years in Bahrain, before spending 15 years with Jardine Fleming in Hongkong and Singapore. Since 2006 he has been based in the Gulf, initially working as CIO for a significant family office in Bahrain where he remains on the Advisory Board before establishing a new family office in Dubai in 2014. He remains an active investor and enjoys finding new and unusual opportunities globally across all asset classes and especially in the private unquoted markets. Prior to his fund management career he served in the Irish Guards.

3rd June
10:20 - 11:00

Panel Discussion:

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

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Ian Morley

Chairman
Wentworth Hall Family Office

3rd June
16:00 - 16:40

Panel Discussion:

A Family Office Guide to Digital Assets & Web3

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.

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Philip Sauer

Managing Director Real Estate & Hotels
Mabel Capital

Philip C. Sauer is the Managing Director Real Estate & Hotels at Mabel Capital, Spain's leading real estate developer for ultra luxurious properties. Philip is a real estate professional with more than 30 years of experience in European Real Estate transactions with a strong background in Asset Management. He holds a Master in Real Estate Investment & Finance from the European Business School in Germany. His experience includes the management of large residential portfolios in Germany as well as new developments in Switzerland and Spain.

4th June
11:00 - 11:40

Fireside Chat:

High-End Luxury: Insights from Mabel Capital on Real Estate, Hotels, and Hospitality

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Henrietta Gourlay

Investment Director
Grosvenor Family Office

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

3rd June
10:20 - 11:00

Panel Discussion:

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

Ian McDonald

Head of Impact & Sustainability
Vedra Partners

Ian McDonald is a Senior Investment Partner and Head of Impact at Vedra Partners, a multi-family office based in London and Lausanne. In this role he has served as Head of Impact for two private equity impact funds that Vedra has helped to establish – one focused on the energy transition and the second focused on sustainable materials and the circular economy.

He has nearly three decades of investment experience, with a strong focus on alternative assets. He was previously CIO at Arden Asset Management, a $10 billion hedge fund-of-funds. Following Aberdeen's acquisition of Arden in 2015, he went on to lead Aberdeen's Client Solutions group. He began his career at Cambridge Associates in Boston and London, and also worked at Morgan Stanley.

He holds a M.A. degree in Economic & Social History from the University of St. Andrews.

4th June
09:30 - 10:10

Panel Discussion:

Conscious Capital: Strategies for Effective Impact Investing

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Sandra Ro

CEO

Global Blockchain Business Council

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

3rd June
16:00 - 16:40

Panel Discussion:

A Family Office Guide to Digital Assets & Web3

Andrew Brenton

CEO & Co-Founder
Turtle Creek Asset Management

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

3rd June
14:40 - 15:00

Keynote Presentation:

Public Equities as a Cornerstone of a Family Portfolio

3rd June
16:40 - 17:00

Keynote Presentation:

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

Robert Epstone

Co-Founder
Sole Family Bali Foundation

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

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

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

Bas Kooijman

CEO
DHF Capital

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

3rd June
15:00 - 15:20

Keynote Presentation:

Steady Performance: Navigating Low Volatility and Diversification for Sustained Growth

Ariel Barack

Senior Partner & CEO
Ordway Selections

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

3rd June
14:00 - 14:40

Panel Discussion:

Venture Capital: Innovation, Entrepreneurship, and Economic Growth

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3rd June
17:00 - 17:40

Panel Discussion:

Beyond Giving: Innovating Philanthropy in the 21st Century

Christoph Courth

Global Head of Philanthropy Services
Pictet

Christoph is a seasoned global philanthropy expert and executive, leading a team of impact strategists, who assist individuals and families in using their wealth to create lasting positive change.

With over 20 years of experience spanning business, international development, and philanthropy, Christoph has spent the past decade advising wealthy families across the globe out of Los Angeles, Zurich, and Geneva.

Before becoming a philanthropy advisor, Christoph dedicated a decade of his career to the non-profit sector across East Africa, the Middle East, the Caribbean, and the UK, working with organizations such as UNICEF and The Prince's Charities.

He is a regular writer and speaker on philanthropy and has been quoted by leading publications including the Financial Times and Forbes. He is a visit-ing lecturer at the *Centre for Philanthropy* at the University of Geneva and has authored a number of thought leadership pieces such as chapters in the publications *Principals and Practice of Impact Investing*i and *The African Philanthropy Toolkit*ii, alongside being the principal author of the *Fundraising Guide: A Resource for Philanthropists*iii and the *Philanthropy Impact Paper*iv series for Pictet.

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Walter Gontarek

CEO & Chairman
Channel Capital

Dr. Walter Gontarek serves as CEO/Chair at Channel Capital Advisors, an FCA authorised and regulated asset manager which makes short term, asset-backed debt investments into the innovation economy. He serves as non-executive/Chair of the Board Level Investment Committee at Catalina Re UK, owned by Apollo Global affiliates. He was previously Managing Director and Global Head of Royal Bank of Canada's credit products business. He holds a doctorate in Finance from Cranfield University and a MBA in Finance from NYU Stern. In 2012, Walt was named on the "Panel of Recognized International Market Experts in Finance" at PRIME Finance at the Peace Palace, The Hague.

3rd June
10:20 - 11:00

Panel Discussion:

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

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Scott Schucht

Senior Manager - Sales & Distribution
CoinShares

Scott Schucht is Senior Manager responsible for Sales and Distribution at CoinShares, Europe's largest crypto asset management specialist. Scott has been focused on the crypto asset management industry at CoinShares for over 6 years and has a wealth of experience working with family offices, private banks and large asset managers to help them understand and make allocations to the emerging crypto asset class. Prior to CoinShares, Scott worked at Europe's leading commodities ETF specialist, ETF Securities and, before that, held senior roles in sales & trading at several leading brokerages in London including Marex, Cantor Fitzgerald, Newedge and Neonet.

3rd June
16:00 - 16:40

Panel Discussion:

A Family Office Guide to Digital Assets & Web3

Tenke Zoltani

Founder
Better Finance

Tenke A. Zoltani is an impact investor and a Chief Impact, Sustainability and ESG Officer, with an unparalleled track record in impact investing strategy, structuring and execution. She is the Founder of Better Finance, working with the world's leading corporate, institutional, and family investors on making investments that deliver shareholder value and strong impacts, from origination to execution. Tenke was also Director, Impact Investing, at UBS where she built out the bank's impact advisory practice for UHNW individuals. Before joining UBS, Tenke was an Investment Manager at Islan Asset Management in Switzerland, advising global agribusiness Bunge on direct investments. She built her expertise in London, consulting on the then-nascent carbon markets, and working in climate finance alongside Lord Nicholas Stern. She is currently a Senior Advisor to UNDP on thematic debt, and is on the advisory boards of TLG Capital and the SDG Joint Fund. She advised the world's first ever species-focused impact bond, conserving rhinoceros, and on the world's first global fund for coral reef conservation. Tenke holds a B.A. in Economics and Political Science from Columbia University and a M.Sc. in International Political Economy from the London School of Economics and is a CAIA Charterholder for alternative finance. When not working, Tenke competes internationally in distance and mountain running, finishing 58th in the World Championships in 2014.

4th June
09:30 - 10:10

Panel Discussion:

Conscious Capital: Strategies for Effective Impact Investing

Let's Connect

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