connectgroup

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.

Shaping the Conversation

Over the years, we have welcomed top-tier leaders and experts from within the industry.
Here are some of the notable speakers from previous editions.

Guillaume Sarkozy
Founding Member & Chairman
GSNB Conseil (SFO)

Giorgiana Notarbartolo
Impact Investor
PFC Family Office (SFO)

Christina-Anne Kyosti
Chairwoman
ViaTalenta Group (SFO)

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

Rodolfo De Benedetti
Chairman, CIR Group

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

Ariane Spandow
Chair Board of Directors,
Spabogruppen & Amesto Group

Davide Tosetti
Managing Director
Tosetti Value - Il Family Office (MFO)

Lars Seier Christensen
Founder and CEO
Seier Capital (SFO)

Isabel Azoulay
CEO
Front Row Family Office

Sir James Wates CBE
Former Chairman
Wates Group (SFO)

Sally Tennant OBE
Founder
Acorn Capital Advisors

Henrietta Gourlay
Investment Director
Grosvenor Family Office (SFO)

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

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

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

Alexandre Mars
Entrepreneur and Philanthropist

Simon Tandy
Chief Investment Officer
Areef Investments (SFO)

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.

Moderator:
Jesús Casado Navarro-Rubio, Secretary General, **European Family Businesses (EFB)**

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 | Panel Discussion
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.

Panellists:
Roger Studer, CEO, Chairman of the Board & Owner, **Studer Family Office**

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.

Panellists:
Arthur Savander, Investor & Board Member, **Fåntell** (SFO)
Anjel Noorbakhsh Ashman, Investment Principal, **Lombos Family Office** (SFO)

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

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

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

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

15:30 - 16:00 | 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
Digital Assets & Family Wealth: Strategies for the Future

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

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

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

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

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

Tue 17 Jun

08:00 - 09:00
Networking Breakfast

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

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

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

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

Moderator:
Dr. Falko Paetzold, Managing Director, **Centre for Sustainable Finance & Private Wealth, University of Zurich**

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

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

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

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

Panellists:
Celine Winter, NextGen Principal, **W5 Group**

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.

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

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.

connectgroup

16th June
09:10 - 09:50

Panel Discussion:

The Multigenerational Family Business: Sustaining Growth, Governance & Legacy

Jesús Casado Navarro-Rubio

Secretary General
European Family Businesses (EFB)

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

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

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

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

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

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

connectgroup

Roger Studer

CEO, Chairman of the Board & Owner
Studer Family Office

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

16th June
10:10 - 10:50

Panel Discussion:

Global Investment Trends: Preparing for Tomorrow's Opportunities

connectgroup

Celine Winter

NextGen Principal
W5 Group

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

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

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

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

17th June
10:30 - 11:10

Panel Discussion:

Real Estate Strategies for European Family Offices

Arthur Savander

Investor & Board Member
Fåntell (SFO)

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

16th June
14:00 - 14:50

Panel Discussion:

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

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.

17th June
11:10 - 11:50

Panel Discussion:

Family Office 2.0: The Next Chapter in Wealth & Legacy

connectgroup

Anjel Noorbakhsh Ashman

Investment Principal
Lombos (Family Office)

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

16th June
14:00 - 14:50

Panel Discussion:

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

connectgroup

Dr. Falko Paetzold

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

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

17th June
09:30 - 10:10

Panel Discussion:

Scaling Impact: How Families Can Drive Meaningful Change Through Investment

Let’s Connect

Connect Partners Limited

71-75 Shelton Street

London, WC2H 9JQ

United Kingdom

Website

Blog

Email

LinkedIn

connectgroup