Join us when over 160 English-speaking Family Offices from all over the world meet under one roof!

Case Studies, Key Notes, Panel Discussions and Networking:

Learn from Family Offices and Genuine Experts
How to improve and optimise your operations and ease your workload with new tools and know-how plus best practice

Improve your operational business
Exchange ideas with many other Family Offices on practical topics such as performance measurement or Family Governance

Liquid and Illiquid Asset Classes – keep your finger on the pulse
Hear from other Family Offices and experts how they manage asset allocation, portfolios and assets such as Alternatives

Free Entry for genuine* Family Offices

* Our definition of a genuine Principal or Family Office is at least USD 150 million of assets (usually it is much more), those assets are from only one or few families / wealth owners, and the Family Office is working for one or few (not as a solution provider to many 3rd parties).
The Family Office Forum Zurich is the annual meeting of more than 160 Family Offices from all over the world, a truly global and international gathering of genuine Family Offices held in English:

How does it work? The global Family Office Forum has a very different formula from other events:

- More genuine* Family Officers than service providers in the audience, and as stage speakers – by Family Offices, for Family Offices.
- Topics are relevant to Family Offices; the Forum is not a sales show and presentations are not about products.
- Only selected Partners/Sponsors who clearly add value may participate. This creates a win-win situation: Family Offices only hear about their interests, and Sponsors/Partners do find that specific interest within their own audience.

The Conference is a networking event with all-day-long networking, plus 5 parallel streams to choose from. See the programme overview – with all presentations and panel discussions – on the next pages!

The Family Office Forum Zurich on 3rd - 4th November is taking place in the Dolder Grand, a spectacular mountain top location, overlooking the city of Zurich and its stunning lake. Just 10 minutes by car to the city center and only 20 Minutes to the airport. Expect beautiful surroundings and an exclusive venue perfect in which to meet like-minded peers.

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The Family Office Forum Zurich is based on:
1. Years of research with over 100 Single and Multi Family Offices, many UHNWI, plus private banks, banks with UHNWI management, academics and partners.
2. The precise wishes and the active support of Family Offices. The agenda is based on the requirements and challenges of Family Offices in their day-to-day business.
3. The long-standing expertise of the partners at Prestel & Partner, in particular with Family Offices. The genuine interests of Family Offices are at the core of our Forum. Please refer to our testimonials at www.prestelandpartner.com

The Family Office Forum takes a closer look. Topics are dealt with in depth to enable our participants to experience genuine progress in their work.

The Family Office Forum offers all participants a platform to exchange experiences, hear about the latest strategies and discuss them afterwards. It is the ideal environment to nurture important relationships and to meet new interesting contacts.

See all 90 speakers at www.prestelandpartner.com
08:00-09:00  Registration and welcome with coffee, tea and breakfast
09:00-09:30  Welcome address: Now is a good time for action and to get involved in change! Her Royal Highness Princess Nisreen El-Hashemite, BSc MSc MD PhD, Executive Director, Royal Academy of Science International Trust (RASIT)
09:30-10:00  Keynote: Technology, perils and prospects - How technology disruption affects businesses, John Kim, Managing Partner, Amasia
10:00-11:00  Morning break in the Ballroom Foyer
11:00-11:30  Keynote: Technology, money and true values - From Gold to digital currency to trust, J. Bradley Hall, Chairman & CEO, ICON
11:30-12:00  Russia and C.I.S. - from investors’ perspective
  - Risk & opportunities investing in Micro Credits
  - Risk neutral approach to Micro Credit
  - How Micro Credit can be scaled up
  
  - How to exploit Micro Credit investment opportunities with Micro Kredit
  - Vincenzo Trani, Micro Capital

12:00-12:30  Next Generation: Raising children with skills, knowledge and motivation
  - Rolf Bauer, Managing Director, Khaos International
  - Family Office Services, Deutsche Bank

12:30-13:00  Manager Selection
  - How to manage manager selection in comparison to benchmark selection based on past data.
  - Selection of managers at various stages of financial market cycle.
  - Strategic investment review of leading bond managers in the eye of the benchmark in interest rates
  - Martin Dr. Bick, Managing Partner, Marmott Investment Office AG

13:00-14:00  Welcome address: Now is a good time for action and to get involved in change! Her Royal Highness Princess Nisreen El-Hashemite, BSc MSc MD PhD, Executive Director, Royal Academy of Science International Trust (RASIT)
14:00-14:40  Keynote: Technology, money and true values - From Gold to digital currency to trust, J. Bradley Hall, Chairman & CEO, ICON
14:40-15:10  Building and supporting strong family growth - How addiction and trauma compromises family vitality and wealth
  - Panel Discussion: Family Governance:
  - Francesco D’Amico, Managing Director, Quiveit’s SFO
  - Lasha Bechtold, CBO, BERNOFF & CO. AG
  - Prof. Dr. Dr. Peter Sester, University St. Gallen and Partners
  - Dr. Antoinette Sarasin, The Kusnacht Practice

15:10-16:00  Afternoon break in the Ballroom Foyer
16:00-16:30  International Operations
  - Citizenship by Investment & International Residence
  - Solutions
  - Challenges and ways to increase the attractiveness of
  - Health and travel freedom for any European country.
  - Considers the line factor - competition in only 3 months.
  - Addressing the insurance market in the prime real estate
  - World.
  - Dr. Antoinette Sarasin, The Kusnacht Practice

16:30-17:00  Panel discussion: Philanthropy
  - Manjula Lee, Head of Philanthropy, Habitat for Humanity Great Britain
  - Dr. Katharina Sonnwendt, GLUT Venture Philanthropy
  - Julian Eagles, Chief Philanthropy Officer, Shadbolt Asset Management

17:00-17:30  Afternoon break in the Ballroom Foyer
17:30-18:00  Panel discussion: "Solving the planet" through investing - How to make impact investments
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  - FERI Family Office
  - Peter Wüthrich, Managing Partner, BEINHOFF & CO. AG

18:00-18:30  Drinks Reception in the Ballroom Foyer - "music apero" by Aleksandra & Alexander Grychtolik (Harpsichord improvisation) Sponsored by PS Plus

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**Programme**

*The Gallery*

**Geographic: Local Heroes**

- **Family Office Forum**
  - **Monday, 3rd November, 8:30-17:30**
  - **The Ballroom**

**Operations, Internal**

- **Garden Salon 3**

**Investment Ops Money Matters**

- **Garden Salon 1**

**Liquid Assets Financial Markets**

**Family Office Forum Zurich 2015**

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**Family Office Forum Zurich 2015**

**Family Governance & NextGen**

- **Case Study - Mastering the challenges from managing a family in its 7th generation, globally spanning 5 continents**
  - Francesco D’Amico, Managing Director, Quiveit’s SFO

**Investment Criteria**

- **Currencies and FX**: How to make the best out of it as a Family Office
  - Thomas Steuer, CEO, Quiveit’s Capital

**Asset Management**

- **Capital Cycles**: Finding investment opportunities in unlikely phases of the investment capital cycle
  - John Kim, Managing Partner, Amasia

**Real Estate**

- **How to deal with and manage this asset class as a family office - case study Germany**
  - Prof. Dr. Lutz Aengevelt, Aengevelt Immobilien

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**Geographic: Local Heroes**

- **Saturday, 2nd November, 8:30-17:30**

**Family Wellbeing**

- **Empower Yourself and Future Generational Protect Health, Energy & Strength through Biomolecular Restoration**
  - Address individual needs to stabilize family businesses
  - Innovative, unique practice to maximize the potential of
  - Benefits of body and mind over generations
  - Dr. Antoinette Sarasin, The Kusnacht Practice

**Philanthropy**

- **The philanthropic investment scene**
  - Changing and complex choices for family offices
  - Empowering the financing of philanthropic investments
  - Choosing and managing Investments into Social and Philanthropic Impact
  - Alternatives within your portfolio
  - Matt Bass, Chief Operating Officer Alternatives, AB

**Collectables**

- **How can philanthropy help to achieve public health objectives**
  - Supporting public health as a sound investment
  - For all types of schemes
  - Going beyond the public health agenda for the public good
  - Investing in tobacco and tobacco policy in a public good
  - Brenda Kowgou, Consultant to the World Health Organization

**Collectables**

- **Creating jobs and education through hospitality**
  - Establishing a for profit project while maintaining
  - Lessons learnt, current challenges
  - Peter Wüthrich, Managing Partner, BEINHOFF & CO. AG

**Collectables**

- **Case Study - Mastering the challenges from managing**
  - How to exploit Micro Credit investment opportunities with Micro Kredit
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**Geographic: Local Heroes**

- **West Africa from an investor’s perspective**
  - Patricia Safo, Founder and Managing Director, Materia

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Join us! 
Registration and welcome with coffee, tea and breakfast 

Welcome address by the organisers Katja Mühlheim and Tobias Prestel

Opening address: Opportunities & Challenges with Investing in Emerging Markets – Insights from the Real Estate, Retail and Hotel Sector, Olaf Schmidt, IFC – World Bank

Morning break in the Ballroom Foyer

Geographic: Local Heroes – The Gallery

Operations, Internal

Garden Salon 3

Investments, Money Matters

Garden Salon 1

Liquid Assets Financial Markets

The Ballroom

Illiquid Assets Direct Investment

Garden Salon 2

Closed captions

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11:00-11:30
11:30-12:10
12:20-12:50
13:00-14:00
14:10-14:40
14:50-15:20
15:30-16:00

Programme

Wednesday

4th November

Prestel & Partner

Family Office Forum Zurich 2015

06

Join us! Register online at www.prestelandpartner.com, by email office@prestelandpartner.com or phone 0044 (0) 20 339 7139 0

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07
Participants
More Family Offices on stage than service providers. More Family Offices in the audience than service providers. For further information on the composition of our audience please see: www.prestelandpartner.com

The high quality and relevance of our delegates is ensured because of
1. Our in-depth research and individual contacts
2. The personal and individual invitations to the Family Office Forum

Free participation is exclusive to genuine* Family Offices. And only relevant partners of Family Offices are able to purchase a delegate pass. In addition the number of delegate passes is strictly limited. This ensures that the participating Family Offices enjoy a meeting among peers.

* Our definition of a genuine Principal or Family Office is at least 100 Mio. GBP of assets (usually it is much more), these assets are from only one or few families / wealth owners, and the Family Office is working for one or few (not as a solution provider to many 3rd parties).

Who is a Partner / Sponsor
Sponsors are experts in their respective fields and work with or for Single and Multi Family Offices. The Family Office Forum is not a sales show: partners and sponsors do not present financial products but assist Family Offices in the optimisation of their processes and workload.

If you want to become a partner / sponsor please contact office@prestelandpartner.com

Partners

BMW i
AB
Dyson
Fondos de Inversión
Green Mountain
Fonds de Banque
SAP
Tolomeo Capital
Icon Capital

Media Partners

BILANZ
Absolut Research
PRIVATE
Portfolio Investment

Imer Systems
Eurorahedge
BAY
BMK Asset Management

ICF
The Kusnacht Practice

Quaesia Capital
Ropes & Gray
Materia

Pafilia
Pareto Securities
Dragon Capital


Pinch
JCS

Dubai, 16 - 17 February 2016

The Middle Eastern Family Office Forum for 100+ Principals and genuine Family Offices. Providers such as Private Banks will be in drastic Minority.

Wiesbaden, 25 - 27 April 2016

Join us when 200+ (!) German speaking genuine* Family Offices meet.

London, 4 - 5 October 2016

100+ England based Family Offices and UHNWI are expected - unique here is our definition of a Family Office, please see below!

Zurich, 8 - 9 November 2016

160+ international Family Offices and UHNWI are expected in November, coming from all over the globe.

Are you a Family Office, or UHNWI? Then you enjoy free entry! * Our definition of a Family Office is minimum USD 150 million of assets from only one or few families / wealth owners, and the Family Office is working for one or few (not as a solution provider to many 3rd parties). Please contact tickets@prestelandpartner.com

Do you work with Family Offices? The Family Office Forum is not a sales show, places for service providers are strictly limited! To register please visit www.prestelandpartner.com

Your Registration:
Online at: www.prestelandpartner.com under tab “Become a Delegate” or send an email to: office@prestelandpartner.com
By phone: Please dial ++ 44(0) 20 339 71390
### Register Now

<table>
<thead>
<tr>
<th></th>
<th>Until 31 January 2015</th>
<th>Until 30 April 2015</th>
<th>Until 5 August 2015</th>
<th>From 6 August 2015</th>
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<tr>
<td>Both Days: 3rd and 4th November 2015</td>
<td>€ 2490 + VAT Save € 600</td>
<td>€ 2690 + VAT Save € 400</td>
<td>€ 2890 + VAT Save € 200</td>
<td>€ 3090 + VAT</td>
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<tr>
<td>One Day Only: 3rd or 4th November 2015</td>
<td>€ 1990 + VAT Save € 600</td>
<td>€ 2190 + VAT Save € 400</td>
<td>€ 2390 + VAT Save € 200</td>
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Registration fee includes refreshments, coffee breaks, snacks, buffet lunch, drinks and conference documentation. Accommodation is not included. VAT subject to government change.

### Free Admission for Family Offices

Are you a genuine Family Office? You have the privilege of free admission. Please contact tobias.prestel@prestelandpartner.com

### Your contact details

- Delegate name: ____________________________
- Title: ____________________________
- Company: ____________________________
- Address: ____________________________
- Country: ____________________________
- Telephone: ____________________________
- Email: ____________________________
- Permission granted by (name and signature): ____________________________

### Payment Details

**Bank transfer:** Prestel and Partner Ltd
Account: 46223368, Sort code 30-99-93, BIC LOYD GB21132, IBAN GB43 LOYD 3099 9346 2233 68, Lloyds TSB Bank
Payments due within 10 days of invoice date, and in advance of the Family Office Forum. For terms and conditions see www.prestelandpartner.com

### Privacy

- Tick here if you do not wish to receive information from Prestel and Partner Ltd.

### Cancellation policy

1. If you are unable to attend your place is transferable.
2. Invoiced amounts are due in full. Prestel and Partner will not issue refunds.
3. If you register but can not attend Prestel and Partner will provide you with conference documentation.
4. Prestel and Partner reserves the right to amend the conference programme and schedule without notice.
5. Prestel and Partner is not responsible for any costs occurring due to any changes or cancellations.

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