



COMPLIMENTARY  
ATTENDANCE  
FOR FAMILY  
OFFICES

# Family Office INVESTMENT SUMMIT:UK

19th March 2014  
Marriott Grosvenor Square,  
London

## Innovative investment strategies for family offices

### Keynote speaker



- Michael Portillo,  
Former Shadow Chancellor  
and Member of Parliament

### Opening address speaker



- Adam Wethered,  
Co-founder,  
Lord North Street

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INTELLIGENCE 

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Dear Colleague,

On behalf of all at *Family Office Intelligence* it gives me great pleasure to invite you to the sixth annual **Family Office Investment Summit** at the Marriott Grosvenor Square in London on Wednesday 19th March 2014.

Following our last Summit – which attracted a record 180 family offices over two days – we have spent several months collecting feedback and putting together an event that explores the topics of most interest to you without repeating the obvious and the overdone.

In addition to the 20+ family offices giving their time to speak on the agenda, we are delighted to have two keynote speakers this year; **Adam Wethered** and **Michael Portillo**.

Mr Wethered is a co-founder of private investment office Lord North Street and will share with us some of the investment insight that has guided one of London's most recognised multi-family office investment portfolios.

Mr Portillo, a former chief secretary to the Treasury and shadow chancellor turned broadcaster will provide an insight into the workings of the Treasury and the mindset of our government as we approach the final year of this parliament.

Other highlights include:

- An emerging markets stream, including family offices from South America and Africa sharing their hands-on experience in those markets
- A look at impact investing, discussing whether investing with the heart is ever good for the head
- Investigating where family businesses and holdings should sit within an investment portfolio
- Our CIO panel – analysing the most successful investment strategies for family offices

All this and of course plenty of networking time for you to meet like-minded family office representatives throughout the day and at the private dinner exclusively for family offices after the cocktail reception.

To register to attend please visit our website or contact a member of the team.

I look forward to seeing you at the Summit this March.



Ben Cronin  
Director  
Family Office Intelligence

## About your keynote speaker:



**Michael Portillo,**  
Former Shadow Chancellor and Member of Parliament

Rt Hon Michael Portillo was a Member of Parliament for most of the period 1984-2005. He was a minister for eleven years, and held three positions in cabinet as Chief Secretary to the Treasury, Secretary of State for Employment and Secretary of State for Defence. Before the 2001 election he was shadow Chancellor.

He is now a broadcaster. He has appeared on about 400 This Week programmes, BBC 1's late night sardonic look at politics. He has also made 126 programmes in the BBC 2 series of Great British - and Great Continental - Railway Journeys.

## About your opening address speaker:



**Adam Wethered,**  
Co-founder, Lord North Street

A Cambridge graduate and qualified barrister, Adam joined JP Morgan (JPM) in 1976. In the early 1990s he was Co-head of Investment banking for Europe and CEO of JPM Securities Ltd, board member of the SFA and in 1993 head of the London offices of JPM. In 1995 he led the restructuring of JPM's European offices as Chief Operating Officer, Europe. From 1997 to 1999 he ran JPM's Private Banking business and the Institutional Clients of JPM Investment Management in Europe and the Middle East.

Adam sits on the board for the Centre for Social Justice.

## Programme:

08:15	Registration and refreshments	
08:45	<b>WELCOME ADDRESS</b>	
08:50	<b>CHAIRMAN'S OPENING REMARKS:</b> Paul Reynolds, Chief Executive Officer, Thamesis	
09:00	<b>KEYNOTE ADDRESS:</b> Adam Wethered, Co-founder, Lord North Street	
09:30	<b>CIO ROUNDTABLE: Divulging best practices in portfolio construction and asset allocation</b> <ul style="list-style-type: none"><li>• How are you currently allocating your investments?</li><li>• What are you doing to diversify your portfolio?</li><li>• Type of alternative investments you are investing in?</li><li>• How is risk management embedded into portfolio construction and stock selection?</li></ul> <b>Jean-Yves Chereau</b> , Chief Investment Officer, Halkin Investments <b>Stephen Jones</b> , Chief Investment Officer, Holbein Partners <b>Sebastian Verkuilen</b> , Chief Investment Officer, Check6wealth	
10:10	<b>PRESENTATION</b>	
10:30	Morning coffee and networking break	
11:00	<b>PANEL DISCUSSION: Seeking out opportunities in equities</b> <ul style="list-style-type: none"><li>• Do fundamentals suggest that equity markets are overvalued?</li><li>• Where should investors look for the best dividend opportunities?</li><li>• How will equity markets play out in 2014?</li><li>• What are the biggest risks?</li></ul> <b>Moderator: Connie Chen</b> , President, Chen Planning Consultants <b>Jonathan Bell</b> , Chief Investment Officer, Stanhope Capital <b>Michael Crawford</b> , Principal, Portfolio Manager Global Equities, Bessemer Trust	
11:40	<b>QUICKFIRE SPONSOR PRESENTATIONS</b> <i>Topic TBC, please see <a href="http://www.familyofficesummit.com/investment">www.familyofficesummit.com/investment</a></i>	
12:00	<b>PANEL DISCUSSION: Real estate: Challenges for the future</b> <ul style="list-style-type: none"><li>• Do family offices invest in real estate for acquisition or cash flow?</li><li>• Where do family offices invest in real estate geographically?</li><li>• Managing risk in the portfolio</li><li>• Strategies for realising returns</li></ul> <b>Mohammed Hasan</b> , Capital VML <b>James Burchell</b> , Chief Executive Officer, Arrowcapital <b>Jean-Marc Brisly</b> , Managing Partner, Even Keel Advisors <i>More speakers TBC, please see <a href="http://www.familyofficesummit.com/investment">www.familyofficesummit.com/investment</a></i>	
12:35	Lunch	
	<b>STREAM 1: EMERGING MARKETS</b>	<b>STREAM 2: DIRECT HOLDINGS</b>
13:35	<b>CHAIRMAN'S OPENING REMARKS</b> <b>Paul Reynolds</b> , Chief Executive Officer, Thamesis	<b>CHAIRMAN'S OPENING REMARKS</b> <b>Ian Morley</b> , Chairman, Wentworth Hall
13:40	<b>PANEL DISCUSSION: Investing in South America in an age of opportunity</b> <ul style="list-style-type: none"><li>• The 2014 World Cup and the 2016 Olympics: What impact does this have on your investment strategy for Brazil?</li><li>• Does the media attention make Brazil more or less attractive to the family office investor?</li><li>• Does South American infrastructure provide the investor with opportunity or is the current condition of the South American infrastructure too risky?</li><li>• Do we need more reassurance on the social and governance issues before any investment in South America is made?</li><li>• What local governance issues have you faced?</li></ul> <b>Carrie Tucker</b> , Chief Financial Officer, Exploration Capital <b>Leonardo Wengrover</b> , Chief Executive Officer, W Advisors <i>More speakers TBC, please see <a href="http://www.familyofficesummit.com/investment">www.familyofficesummit.com/investment</a></i>	<b>PANEL DISCUSSION: Family business as an asset class</b> <ul style="list-style-type: none"><li>• How to promote long-term growth in a family business</li><li>• How to encourage entrepreneurship in a family business in order to create and maintain innovative growth strategies</li><li>• Strategic succession planning</li></ul> <b>Sandy Loder</b> , Chief Executive, AH Loder Advisers <b>Raiyan Islam</b> , Islam Family Office (Cassmark) <b>Gary Martin</b> , Director, The Martin Group <b>Leoš Novotný</b> , Chief Executive Officer, LEO Express

## Programme (continued):

14:15	<p><b>PRESENTATION: The differing opportunities for family offices in Asian emerging markets</b></p> <ul style="list-style-type: none"> <li>The difficulties in using traditional fund models for emerging markets</li> <li>The equities market: Does the family office use private equity or public funds or a hybrid of both?</li> <li>Best-practice for due diligence</li> </ul> <p><i>Speaker TBC, please see <a href="http://www.familyofficesummit.com/investment">www.familyofficesummit.com/investment</a></i></p>	<p><b>PRIVATE EQUITY INVESTING: A conversation with Guy Fraser-Sampson and Edward Collins</b></p> <ul style="list-style-type: none"> <li>What are the reasons for the shortage of families participating in direct investing?</li> <li>What are the challenges you face in direct investing?</li> </ul> <p><b>Guy Fraser Sampson</b>, Chief Investment Officer, GP10 Capital Partners LLP  <b>Edward Collins</b>, Managing Director and CIO, Hanson Family Holdings</p>
14:35	<p><b>PANEL DISCUSSION: Getting ahead – how to make the most of an early investment in Africa</b></p> <ul style="list-style-type: none"> <li>What is the current state of the African market?</li> <li>Why should we follow suit and aim to invest early?</li> <li>Should we be investing in agriculture?</li> <li>What can Africa do to appear more attractive to investors?           <ul style="list-style-type: none"> <li>Infrastructure</li> <li>Compliance</li> </ul> </li> </ul> <p><b>Per Wimmer</b>, Chief Executive Officer, Wimmer Family Office  <b>Bill Cotter</b>, VC Financial  <b>Bhavik Shah</b>, Co-founder, Director, Niveda Investments</p>	<p><b>PRESENTATION: An innovative approach to asset allocation</b></p> <ul style="list-style-type: none"> <li>Beyond Static Asset Allocation – Dynamic Asset Allocation</li> <li>Credit Growth and Currency as the drivers of Asset Prices</li> <li>A simple approach that adapts to the changing economic environment</li> </ul> <p><b>Akber Zaidi</b>, Director, Clarmond House</p>
15:10	<p><b>PRESENTATION</b>  <i>Topic TBC, please see <a href="http://www.familyofficesummit.com/investment">www.familyofficesummit.com/investment</a></i></p>	<p><b>PRESENTATION</b>  <i>Topic TBC, please see <a href="http://www.familyofficesummit.com/investment">www.familyofficesummit.com/investment</a></i></p>
15:30	Networking break	
16:00	<p><b>PRESENTATION: Going back to hedge funds</b></p> <ul style="list-style-type: none"> <li>How to find a hedge fund in line with the philosophy of a family office</li> <li>Scrutiny: How does a family office measure the due diligence of a hedge fund in today's climate?</li> <li>How important is a hedge fund to the investments of a single family office?</li> </ul>	
16:20	<p><b>PRESENTATION: Investing in the eurozone</b></p> <ul style="list-style-type: none"> <li>Why investing in Europe is back 'in vogue'</li> <li>Does relative social and political stability continue to make Europe an attractive place for investors?</li> <li>What does the recent German election say about the state of the European market?</li> <li>As Turkey emerges as a part of the TIMPs (Turkey, Indonesia, Mexico and the Philippines) should we be treating it as a European market?</li> </ul>	
16:50	<p><b>PANEL DISCUSSION: Impact investing</b></p> <ul style="list-style-type: none"> <li>Should the social impact be a guide for the investment opportunity?</li> <li>How to evaluate the positive social and environmental challenges through the deployment of capital</li> <li>The definition of impact investment: Is it a matter of interpretation?</li> <li>What is the impact of impact investing on the investor?</li> <li>Examining values in the next generation: are they in line with the current or traditional family values?</li> <li>How does impact investing in the private banking sphere compare with that of family offices?</li> <li>What comparisons can be drawn from impact investing in Asia, the Middle East and Europe?</li> <li>What are the main challenges for impact investing? What lessons can we learn from past investments?</li> </ul> <p><b>Mr. Gamil de Chadarevian</b>, Method Impact Ltd, Co-Founder and CEO  <b>Rico Baumgartner</b>, Chief Executive Officer, Baumgartner Family Office  <b>Ida Beerhalter</b>, Co-Head, IOME Family Office</p> <p><i>More speakers TBC, please see <a href="http://www.familyofficesummit.com/investment">www.familyofficesummit.com/investment</a></i></p>	
17:30	<b>KEYNOTE ADDRESS: Michael Portillo</b> , Former Shadow Chancellor and Member of Parliament	
18:00	<b>CHAIRMAN'S CLOSING REMARKS</b>	
18:10	Drinks reception	
19:10	Private dinner	

## Speakers



- Mr. Gamil de Chadarevian,  
Co-Founder and CEO,  
Method Impact Ltd



- Stephen Jones,  
Chief Investment Officer,  
Holbein Partners



- Rico Baumgartner,  
Chief Executive Officer,  
Baumgartner Family Office



- Jean-Yves Chereau,  
Chief Investment Officer,  
Halkin Investments



- Per Wimmer,  
Chief Executive Officer,  
Wimmer Family Office



- Gary Martin,  
Director,  
The Martin Group

## About Family Office Intelligence



Family Office Intelligence is a global event organiser hosting regular Summits and networking events for private family offices and their trusted advisors.

We introduce and promote interaction between family offices to help them share their knowledge and experience overcoming all the issues they face running their businesses.

Founded in 2004, Family Office Intelligence is part of Incisive Media, publisher of titles such as Hedge Funds Review, Investment Week, and many other market-leading magazines covering the financial markets.

Leveraging this global reach and access to investment professionals, we attract experts speakers to each event providing unrivalled expert and informative content for our investor audience.

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