

2010 FOX Global Family Forum  
*Leading Families  
Through Challenging Times*

*An Exclusive Programme for Wealth  
Owners and Family Office Executives*

13–14 September 2010  
The Langham  
London, United Kingdom



## MONDAY, 13TH SEPTEMBER

**Headline Sponsor Société Générale Corporate & Investment Banking**

**9.00-11.00 Registration and Breakfast**

**11.00-11.15 Overview of Attendees and Agenda for Forum**

*Paul Pratt, Managing Partner, Family Office Exchange LLP*

**11.15-12.45 Family Legacy and Leadership: Preserving True Family Wealth in Challenging Times, ©2010, Wiley & Sons.**  
*Book Sponsorship will be provided by McLean Budden*

### Part I: Family Legacy and Legacy Planning

*Mark Daniell, Founder, Cuscaden Group*

An appreciation for family legacy begins with an understanding that legacy encompasses the past and all that a family wants to preserve for the future – the history, values, knowledge and experiences that are just as essential as the financial capital. Legacy planning is the process that involves documenting reasons for staying together, agreeing on The Family Promise, and investing in the education and training of family members to enhance the legacy.

### Part II: Family Leadership and Succession Planning

*Sara Hamilton, Founder and CEO, Family Office Exchange LLP*

An understanding of family leadership responsibilities begins with an understanding of the challenges of leading a family enterprise and the differences between corporate leadership and family leadership. Profiles of successful family leaders will be described along with the unique leadership skills needed for the 21st century. This section will finish with eight principles that ensure a successful succession process, and how to get the family more engaged in that process.

### Part III: The Management of Risk and Change

*Kripa Sethuraman, Managing Partner, Family Office Exchange LLP*

While nothing guarantees the future, the chances of sustaining a family legacy over multiple generations are greatly enhanced by an appreciation for change and the management of uncertainties. Achieving this goal requires an ability to effectively manage threats to long-term prosperity while identifying opportunities to grow and enhance family assets. This section of the book highlights strategies gleaned from wealth owners and industry thought leaders for developing a risk management mentality and creating an entrepreneurial culture.

**13.00- 14.00 Networking Lunch**

**14.00- 15.15 Investment Perspectives in a Shifting Economic Climate**

*Charlie Grace, Senior Consultant, Family Office Exchange LLP*

*Guy Ingram, co-founder and Head of Research,*

*Albourne Partners Limited*

*Dr. Robert Fray, Founder, Harbor Financial*

The session will provide insights from Senior Office Executives regarding investment past performance and investor outlook on risk in the wake of the global financial crisis. A panel of private investors will discuss their views on risk-taking and the future role of alternative asset classes in private investment portfolios. Questions from the audience will ensure a lively debate.

**15.15-15.45 Coffee Break**

**15.45- 17.00 Private Dialogue Sessions with Peers**

One of the most valuable benefits of the Forum is the opportunity to meet peers. In this session, facilitators will lead peer group discussions regarding three topics: Family Legacy and Leadership, the Risk Management Process, and Investment Trends and Opportunities. Participants will select the group with which they would like to have a peer discussion regarding one of these three topics.

**18.30- 21.00 Networking Reception and Dinner**

*Sponsored by BNY Mellon*

*Location: The Wallace Collection, Hertford House  
Manchester Square, London W1U 3BN, United Kingdom*

## TUESDAY, 14TH SEPTEMBER

**Headline Sponsor Société Générale Corporate & Investment Banking**

**8.30-9.00 Registration and Breakfast**

**9.00-9.15 Opening Remarks**

**9.15-10.15 Regulatory Changes and Their Impact on Long-Term Planning for the Family and the Family Office**

*Christopher E. Steckel, Tax Partner, KPMG*

*Ashley Crossley, Partner, Baker & McKenzie LLP*

Leading tax and legal advisors will provide a global perspective on pending changes in regulation in many countries. The panel will identify

strategies for consideration based on alternative scenarios that may occur across jurisdictions, and the impact this has on planning for the financial family and the private family enterprise.

**10.15-11.15 Coffee**

**11.15-12.15 Breakout Groups**

### Leadership Succession in the Family Enterprise

*Penny Webb, Founder, Familias and Company*

This session will discuss strategies for managing the interface between the family and the family business. Ms. Webb will identify guidelines for setting clear boundaries between the two, protecting family assets while preserving family unity.

### Best Practices in Small Family Offices

*Kripa Sethuraman, Managing Partner, Family Office Exchange LLP*

We will take a look at the services, costs and operations of small family offices (less than 7 staff) via proprietary data from Family Office Benchmarking and member surveys, including insights about common challenges and real-life solutions that have been used with success.

### Educating and Engaging the Younger Generation

*Sara Hamilton, CEO, Family Office Exchange LLP*

*Edouard Thijssen, Co-Founder, Younited S.A.*

Members of the next generation face unique challenges. Here we will look at leading practices for engaging future owners and for developing a sense of entrepreneurship, responsibility and cohesiveness across family groups. We will continue the discussion on structuring an appropriate risk-taking culture in the family.

### Impact of Regulatory Reform on Multi-Jurisdictional Families

*KPMG Private Client Partners*

This session will give participants an opportunity to exchange ideas and ask specific questions of the advisors regarding proposed changes in tax legislation.

**12.30-13.45 Networking Lunch**

**13.45-15.00 Breakout Groups**

### Transitioning a Single Family Office to a Multi-Family Office

*Charlie Grace, Senior Consultant, Family Office Exchange LLP*

*Christian Stadermann, Managing Director, Harald Quandt Holding GmbH*

This session will identify the opportunities and challenges involved in transitioning from a single family office to a multi-family office where other families are invited to use the services of the family office. The story of one leading European family's own journey through the process will be presented.

### Strategic Philanthropy as a Part of Family Legacy

*Etienne Eichenberger, Executive Director, wise*

*Yann Borgstedt, Group Pelichet*

An expert philanthropic advisor will provide insights about recent efforts to develop meaningful programs that have measurable philanthropic impact. Examples of family groups who have used a strategic approach for identifying a sustainable philanthropic mission will be provided, demonstrating ways to foster an ongoing reward for both the philanthropic initiatives and the family members involved.

### Asset Allocation Strategies

*Philippe Parmenon, Head of Sovereigns, Family Offices and Holdings*

*Companies, Société Générale Corporate & Investment Banking*

We will focus on the new investment environment and the opportunities therein for private investors in 2010 and beyond. This includes an examination of asset allocation strategies that present the greatest opportunities in liquid and non-liquid markets, and a framework for the private investor in managing and balancing risk.

**15.00-15.30 Coffee Break**

**14.45-15.45 Perspectives for the Future**

*Dr Patrick Dixon, Coauthor of "SustainAgility", Founder & Chairman,*

*Global Change, LTD.*

### Underwritten by Edmond de Rothschild Private Equity Select LLP

Dr Dixon is often described as Europe's leading futurist. He will share views on current macro-economic and social trends, and how they can shape our perceptions of risk and opportunity for the future decade. A dynamic, provocative and entertaining speaker, Patrick helps organizations understand future trends, manage risk and seize opportunities. A successful entrepreneur and physician by training, he is the author of 12 books in 24 languages and was ranked as one of the world's 20 most influential business thinkers by Thinkers 50.

**16.45-17.00 Closing Remarks**

Headline Sponsor Société Générale Corporate & Investment Banking

## Hotel Information

### The Langham

1c Portland Place  
Regent Street  
London W1B 1JA



Family Office Exchange has negotiated discounted room rates with The Langham for our attendees. Reservations are on a first-come, first served basis. Please reserve your rooms directly with the hotel on +44 (0) 20 7973 7503, and quote FOX Global Family Forum to receive the discounted rate.

## Ways to Register

1. Register online at <http://www.foxexchange.com/public/fox/international/IntlEvents.asp>
2. Fax this form to Nicole Smith at +44 (0) 20 7170 4234
3. Email a scan of the registration form to Nicole Smith at [nsmith@familyoffice.com](mailto:nsmith@familyoffice.com)

## Forum Participant Details

Name (First/Last)

Family Name and Firm Name

Title/Position

Street Address

City Postal Code Country

Phone Fax

E-mail

Special Dietary or Accessibility Needs

How did you hear about the FOX Global Family Forum?

- I will attend the Networking Reception and Dinner on 13 Sept.

## Breakout Groups

(please choose one breakout from each session):

- Leadership Succession in the Family Enterprise (session 1)
- Best Practices in Small Family Offices (session 1)
- Educating and Engaging the Younger Generation (session 1)
- Impact of Regulatory Reform on Multi-Jurisdictional Families (session 1)
- Transitioning a Single Family Office to a Multi-Family Office (session 2)
- Strategic Philanthropy as a Part of Family Legacy (session 2)
- Asset Allocation Strategies (session 2)

## Comments made about September, 2009 Conference

"The recent Global Family Forum hosted by Family Office Exchange in Zurich was an excellent opportunity for wealth owners and family offices to exchange ideas and concepts on a country-by-country as well as on an international basis. World economic power is shifting away from America and Europe towards Asia and the Middle East and peer exchange on this basis is an invaluable asset to have."

—Jeff Chapman, Bennelong Group

## Dinner Information Underwritten by BNY Mellon

### Wallace Collection

Hertford House  
Manchester Square, London  
W1U 3BN, United Kingdom

## Member Registration Fees

- Members **GBP 0**  
(1 attendance included in membership)
- Member Rate **GBP 1495 +17.5% VAT**
- Non-Member Rate\* **GBP 1995 +17.5% VAT**
- Family Group Offer **GBP 5985 +17.5% VAT**  
(for four attendees)

\* Please be aware, as a non-member, FOX will contact you to request family information to ensure we keep attendees to single family offices and encourage true peer exchange.

## Ways to Pay

1. By Debit/Credit Card  Visa  MasterCard

Cardholder Name

Card Number

Valid From Exp Date CVV Code

2. By cheque payable to:  
Family Office Exchange Office;  
Winchester House, Suite 307,  
259-269 Old Marylebone Rd.  
London NW1 5RA United Kingdom
3. If you prefer to pay by bank transfer, please contact:  
Nicole Smith at +44 (0) 20 7170 4236 or  
by email at [nsmith@familyoffice.com](mailto:nsmith@familyoffice.com).

## Refund Policy

All cancellations must be made in writing to Family Office Exchange. Cancellations received on or before 12 July will be refunded 50%. Cancellations received after 12 July will be refunded 25%. No refunds will be made on site or for no-shows.

## Questions?

Contact Nicole Smith at +44 (0) 20 7170 4236 or [nsmith@familyoffice.com](mailto:nsmith@familyoffice.com)

## About Family Office Exchange

Family Office Exchange (FOX), established in 1989, is a global company serving family groups and advisors, providing confidential education, peer networking and advisory services to 340 wealthy families and their family office staffs. FOX also supports 170 advisory firms specializing in family wealth management and advisory services.

To learn more about FOX and the benefits of membership, contact:

### Paul Pratt

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### Kripa Sethuraman

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"The Global Family Forum in Zurich was great. It gave me a lot of food for thought. So much so that I spent 4 hours of the plane ride back to Singapore going over some of the conference materials. The content and presentations have helped develop and crystallise my thoughts regarding Single Family Offices and the various roles they play in supporting the family and their individuals and operating business"

—Yuelin T. Yang, IMC Corp Limited



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