

# Wealth Management & Family Office

## *Creating the Structure, Preserving the Wealth*



29th - 30th May 2008 - Zurich, Switzerland  
Renaissance Zurich Hotel

### Bronze Sponsor



Wealthy clients need help with the organization and management of their assets. Listen to experts in this field and discover how to create the structures that will take them above and beyond their needs. Recognize potential opportunities for your clients by examining international laws and regulations related to wealth planning and learn major principles in national and international estate and tax planning. This conference will highlight new opportunities in the emerging wealth markets whilst examining proven strategies.

### Sponsor



If your company is focused on targeting affluent clients then this event is not to be missed. While new wealth is being created at an unprecedented rate, financial institutions must have the most innovative products in order to discover the advantages that exist. At this international event we will determine how high risk alternative investment, real estate and philanthropy can improve your performance.

*"The Uniglobal Research Wealth Management & Family Office conference will be the key to taking advantage of emerging wealth in 2008"*

### Media Partners



### Official Carrier of the Event



### Benefits for attending:

- Gain a unique overview of the evolving Wealth Management & Family Office climate and understand the potential of emerging wealth markets
- Explore the effective strategies and deterrents in both leading and emerging markets
- Access the most innovative investment solutions and diversify your portfolio across a broad range of asset classes in the HNWI market
- Evaluate the increasingly important roles of Real Estate & Philanthropy
- Get to grips with focused market issues during our Strategic Discussions
- Deepen business relations by taking advantage of our unique networking opportunities with the industry's leading players
- Debate current trends and establish industry best practices in global wealth management
- Take part in an event where key industry decision makers will provide new information about alternative investment

### With contributions from:

ABN AMRO  
AIG  
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Credit Suisse  
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Solutions 4 Wealth  
UBS  
URALSIB

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29th - 30th May 2008 – Zurich, Switzerland



THURSDAY, 29th MAY 2008

DAY ONE

8.50 Registration & Morning Coffee

9.20 Welcome & Opening Remarks

### SESSION 1 FUTURE TRENDS IN WEALTH MANAGEMENT & THE FAMILY OFFICE

9.30 **Preserving the Family's Wealth: Opportunities and Dangers**

- Common misconceptions by wealthy families and their advisors
- Ways out of the danger area
- Discussion of solutions

**Dr. Ariel Sergio Goekmen, Director, Credit Suisse, Switzerland**

10.10 **Panel Discussion: The Increase of HNW Clients in Developing Markets and its Impact on Financial Institutions**

- Who will be the clients of the future?
- Exploring new financial instruments
- What are the growing trends Mergers & Acquisitions
- Practical examples of successful implementation
- New markets: Where is the potential?

**Robert Kalinic, Director, Central Eastern Europe Private Banking, ABN AMRO Bank, Switzerland**

**Henry Nevstad, Partner, Solutions 4 Wealth, UK**

10.50 Networking break: Refreshments & Coffee

### SESSION 2 CREATING PHILANTHROPISTS

11.10 **Developing a Strategy for Philanthropy**

- The current trends in giving
- Factors which make giving more likely
- The role of the professional advisor
- The link between asset management and philanthropic interests
- Summary of the key steps

**Dr. Maximilian Martin, Head of Philanthropy UBS, Switzerland**

11.50 **Managing Philanthropy**

- The approach needed in order to shape a giving portfolio
- Collaborating between financial advisors and philanthropy advisors
- Charitable Grant making solutions
- Fund and foundation consulting
- Endowment consulting and management
- Compliance governance and succession planning

**Penny Lovell, Head of Business Development Fleming Family & Partner, UK**

12.30 Networking Lunch

A limited amount of exhibition space and other packages are available for leading solutions providers to attend the conference. For further information please contact **Jeff Maric** on [jeff@uniglobalresearch.eu](mailto:jeff@uniglobalresearch.eu) or Telephone +420 226 538 100

### SESSION 3 STRUCTURING A FAMILY OFFICE

13.40 **The Jurisdiction of a Family Office**

- Overview of the jurisdictions
- General legal assistance on a day to day basis
- Issues for foreign based companies
- Structures for international families
- Highlighting unique competitive advantages
- Outlining the potential value for clients

**Stephen Cutts, Director**

**Rawlinson & Hunter, Monaco**

14.20 **Panel Discussion: Recruiting for a Family Office**

- Understanding the importance of intergenerational wealth transfer
- What is the Role of a Family Officer in Europe?
- The benefits of multi-manager approach: performance, reliability and consistency
- Experience in multi-manager solutions for HNWI
- Making traditional and alternative investments work for the HNWI

**Dr. Ariel Sergio Goekmen, Director, Credit Suisse, Switzerland**

**Dr. Steen Ehlern, Managing Director, Ferguson Partners Family Office, Switzerland**

15.30 Networking break: Refreshments & Coffee

### SESSION 4 EMERGING MARKET WEALTH

16.00 **The Rise of the Baltic States**

- Family Office opportunity in the Baltic States
- How are the Baltic States rated in terms of foreign investment – How can they attract foreign investment?
- Latvia – New opportunities in wealth management and Family Office
- Examine the rise of Latvia as the preferred destination for private banking and wealth management

**Roberts Idelsons, President, Parex Asset Management, Latvia**

16.40 **Growth of the Family Office in Russia**

- Investment opportunities in Russia and CIS countries as one of the best performing emerging markets: balancing risks and interests
- Is growth sustainable?
- High rates of economic growth generate big earnings – growth of assets under management
- Investment needs of Russian HNW clients

**Valery Chumachenko, Marketing Director, URALSIB, Russia**

17.20 Chairman's Closing Remarks and End of Day One

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FRIDAY, 30th MAY 2008

DAY TWO

8.30 Registration & Morning Coffee

9.00 Welcome & Opening Remarks

SESSION

# 5

## PRESERVING WEALTH THROUGH INVESTMENT

9.10 **Changing needs of the Privately Wealthy to Responsible Investment**

- Changing attitudes to Responsible Investment
- What HNWI's can buy today in the RI space - pros/cons - (Niche SRI funds, Engagement overlap providers, Sector funds, Integration, Social investing)
- What makes HNWI's different from retail and institutional clients?
- So what does Bill Gates really need?  
What does Prince Charles really need?

**Raj Thamotheram,**  
Director of Responsible Investments, AXA, UK

9.50 **The Family Office approach to Structured Products**

- Why do family offices invest in structured products?
- High net worth client expectation from structured products
- Structuring unique solutions
- How are they used by family offices?
- Justifications of cost and fees through returns

**Christophe Baurand, Structured Alternative Investments**  
SG Corporate & Investment, France

10.30 Networking break: Refreshments & Coffee

SESSION

# 6

## ALTERNATIVE INVESTMENT

10.50 **Private Equity in Emerging Europe**

- How funds are integrating new alternative asset classes
- The benefits of private equity investments for institutional investors
- What are the most favorable jurisdictions and structures for private equity investors investing in Europe?
- Risk concerns for 2008?

**Doina Popescu, Regional Director, AIG, Romania**

SESSION

# 7

## TAX & ESTATE PLANNING

11.30 **How to use tax and estate planning in emerging markets**

- How tax planning techniques in mature markets can be used in emerging markets
- Tax and civil consequences of relocation of high net worth individuals
- Tax efficient countries to relocate to
- Emigration and pre-immigration planning

**Fiona de Vos van Steenwijk, Vice President,**  
International Estate Planning  
**Jan Van Bueren, Director, International Estate Planning**  
ABN Amro, Netherlands

## 12.10 STRATEGIC INTERACTIVE LUNCH

This discussion will take place in the Hotel Restaurant. The table arrangement will follow a round table format for ten persons each. Delegates will summarise the main issues raised at the conference and discuss this in an informal interactive working lunch. Heads of Tables will present these conclusions in an open discussion session following lunch.

SESSION

# 8

## REAL ESTATE INVESTMENT OPPORTUNITIES

13.40 **Emerging Trends in Real Estate Europe 2008**

- How European and international economic trends and issues are affecting real estate
- Real estate markets to watch
- Property types in perspective
- Trends in the Swiss real estate market

**Daniel Matti, CFA, Manager Corporate Finance Real Estate**  
PricewaterhouseCoopers, Switzerland

14.20 **Unlocking Real Estate**

- Real Estate, what is it?
- How do we respond to the Market Need?
- Combining private clients and institutional clients;  
The case for Feeder Funds

**Robbert Staal, Director Institutional Clients**  
ING, Netherlands

15.00 Networking break: Refreshments & Coffee

SESSION

# 9

## CROSS BORDER PLANNING

15.20 **The Use of Fiduciary and Insurance Solutions**

- Estate and Succession Planning Issues
- Trust Solutions: Settlor Reserved Powers Trust,  
Private Trustee Company
- European and US Insurance solutions for fiscal optimisation
- US Connections and Beneficiaries
- UK Resident Non-Domiciled Issues

**Mark Smallwood, Key Clients Group**  
Deutsche Bank, Switzerland

16.00 **Summary of Strategic Interactive Lunch**

16.30 Closing Remarks & End of the Conference

I would like to thank everyone who assisted with the research and organisation of this Conference, particularly the speakers for their support and commitment.

Shane Crean, Conference Producer

email: [screan@uniglobalresearch.eu](mailto:screan@uniglobalresearch.eu), tel. in Prague: +420 - 226 538 100



# Wealth Management & Family Office

## Creating the Structure, Preserving the Wealth

29th - 30th May 2008 - Zurich, Switzerland



### To register, complete this Registration Form and fax it back to + 420 - 226 538 111

Please complete a separate Registration Form for each delegate. You can make photocopies of this form if necessary.

Title: \_\_\_\_\_

Name: \_\_\_\_\_

Job title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_

City & ZIP: \_\_\_\_\_

European Union VAT Registration No: \_\_\_\_\_

Tel.: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

#### Payment

Conference fees: Standard Delegate Place:  
 € 1621 EUR

Fee includes Conference participation, Conference materials, luncheons and refreshments during the 2-day Conference and all service charges.

#### Please charge my:

Amex  Visa  MasterCard  Diners  JCB

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#### Confirmation

Once a conference space has been allocated to you we will write to confirm the date and receipt of your payment.

UNIGLOBAL RESEARCH

Conference Code: WMF/2008/26-03/10.00

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Swiss International Air Lines is proud to be the Official Carrier for the Wealth Management & Family Office 2008 in Geneva and is offering special Congress Fares to all participants. These Congress Fares offer reductions of up to 25% depending on the fare type, route and space availability.



Congress Fares are valid on the entire SWISS route network for flights to Switzerland, including flights operated by partner airlines under an LX flight number. These fares are now bookable for the travel period 14 days prior to and 14 days after the event.

To take advantage of this offer, book easily and conveniently through SWISS.COM via the following link:  
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#### Accommodation

Hotel accommodation and travel expenses are not included in the registration fee.

#### Delegate Substitution & Cancellation Policy

Substitute delegates are welcome, but at least 3 day's notice of the change must be given. If Uniglobal Research decides for any reason to cancel the event the full refund of the registration fee will be made to the registered customer. However, no refunds or part refunds shall be made by Uniglobal Research for changes in event programme, dates, venue, or speaker composition. In the event that Uniglobal Research changes the dates or postpones the Conference, delegate payments at the postponement date will be credited towards the rescheduled date. If the delegate is unable to attend the rescheduled event, the delegate will receive a 100% credit representing payments made towards a future Uniglobal Research event. Cancellations received in writing by April 14, 2008 will be refunded in full less an administrative charge of 25% of the conference fee. Should you need to cancel your registration after this date, the registration fee remains payable in its entirety. All cancellations must be done in writing stating the mailing date. Registered delegates who cancel their attendance or do not show at the event will receive conference documentation.