

# Wealth Management & Family Office, Zurich

Register by  
25th January 2008  
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## Best Practice in Managing the Wealth of Ultra High Net Worth Individuals & Families

Line up of expert speakers:

### Family Offices:

**Alexander Scott**  
Executive Chairman  
SAND AIRE

**Pierre Condamine-Gerbier**  
Managing Partner  
REYL PRIVATE OFFICE

**François Mollat du Jourdin**  
Managing Partner, Founder  
FINANCIERE MJ – FAMILY OFFICE

**Francesco Aletti Montano**  
Chief Executive  
ALETTI MONTANO & CO,  
FAMILY OFFICE

### Wealth Advisors:

**Dr Edgar Paltzer**  
Attorney-at-Law  
NIEDERER KRAFT & FREY

**Dr. Marcel Widrig**  
Partner, Private Clients  
PRICEWATERHOUSECOOPERS

**Simon Weil**  
Head of Individuals Group  
BIRCHAM DYSON BELL LLP

**Philippe Van den Broecke**  
Partner  
ASTREA

**Stephan Wijnkamp**  
Partner  
HENLEY & PARTNERS

**James McNeile**  
Partner  
WITHY KING

**Christian H. Kälin**  
Partner  
HENLEY & PARTNERS  
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VERICA TRUST & CAPITAL MANAGEMENT AG

**Caroline Garnham**  
Partner  
LAWRENCE GRAHAM

**Michael Maslinski**  
Director  
MASLINSKI & CO

**Ted Wilson**  
Senior Consultant  
& **Graham Harvey**  
Analyst  
SCORPIO PARTNERSHIP

**Etienne Eichenberger**  
Co-founder  
WISE PARTNERSHIP

**Ludwig Forrest**  
Project Manager  
KING BAUDOUIN FOUNDATION

**Tonya Hoffman**  
Founding Partner  
LEADING MINDS

**Felicity A. Keller**  
Managing Director  
Head of Private Wealth Advisory  
STANFORD GROUP (SUISSE) AG

**James K. Myers**  
Founder & Chief Executive  
EUROPEAN ASSOCIATION OF PLANNED GIVING

**Erich Baier**  
Certified Tax Advisor  
BILANZ-DATA  
WIRTSCHAFTSTREUHAND GMBH

### Private Banks:

**Dr. Ariel Sergio Goekmen**  
Director, Private Banking Division  
CREDIT SUISSE

**Grégoire Bordier**  
Managing Partner  
BORDIER & CO., Private Bankers

**Kevin Reid**  
Managing Director  
AIG GLOBAL REAL ESTATE

Conference highlights:

- Switzerland's role in international tax structures for wealthy families
- Family Office – **make or buy?**
- The Family Office and the role it plays
- **Family Office vs. Private Bank** in delivering client service
- Panel Debate – how will Family Offices evolve?
- Managing succession issues – what is the role of the advisor
- Preserving family wealth: The Family Office as **risk manager**
- **Succession planning** in Switzerland
- Panel Debate – how to engage in **philanthropy**
- Global **asset allocation** and manager selection
- **Real-estate** investments in Eastern Europe
- Diversifying the portfolio – a look at rising areas of investment
- The changing role of the Family Office
- **Residence and citizenship** planning for UHNW clients
- How performance and philanthropy are linked
- **Cross border** tax & estate planning

Thursday 28th & Friday 29th February 2008,  
Renaissance Hotel Zurich

### Plus! Pre-conference Workshop

Wednesday 27th February 2008

## International Residence & Citizenship Planning for UHNWI

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# Conference Day One

08.30 Registration & Coffee

09.00 Chairman's Welcome

## NEW KEYNOTE ADDRESS

Who Needs a Family Office;  
Why, When & Which Type?

**Dr. Steen Ehlers**

FERGUSON PARTNERS FAMILY OFFICE

## 09.10 Make or Buy a Family Office?

- Processes behind the Make or Buy decision
- Understanding the wealthy family's needs
- Growing the assets

**Dr. Ariel Sergio Goekmen**

Director, Private Banking Division

### CREDIT SUISSE

Ariel Goekmen is a Director of Credit Suisse in the Private Banking division, based in Zurich. He is in charge of the 'Wealthy Families' sector, advising wealthy families on international asset management, risk mitigation and strategic issues. At the same time he is responsible for the "UK resident non-domiciled" centre of competence. His responsibilities include assisting in the implementation of appropriate holding structures for tax optimisation and succession planning, in cooperation with a network of in-house and external experts.

## 9.50 The Family Office & the Role it Plays

- Evolution of the Family Office sector
- Considerations when establishing a Family Office
- Current landscape of the sector
- Different Family Office operating models

**Alexander Scott**

Executive Chairman

### SAND AIRE

Alex Scott is Chairman of Sand Aire Investment Management, a company he formed in 1996 after leading the sale of his family's business, Provincial Insurance. Sand Aire is a full-service Multi-Family Office, delivering investment and family office services to several wealthy families. He is also a director of Stramongate Ltd, his family's investment holding company, a non-executive director of the JP Morgan Fleming Mid Cap Investment Trust, co-founder and past Chairman of the Institute for Family Business (UK) and a director and trustee of several other entities.

10.30 Morning Coffee

## 10.50 Multiple Family Office vs. Private Bank in Delivering Client Service

- Why go to one or the other?
- Which is the better model?
- Which provides a better service to the client?
- What can Private Banks and wealth managers learn from the Family Office?
- Can Private Banks compete or should they focus on their strengths in key areas?

**Ted Wilson**

Senior Consultant

**& Graham Harvey**

Analyst

### SCORPIO PARTNERSHIP

Ted Wilson is senior consultant at Scorpio Partnership. His focus at Scorpio Partnership includes market entry strategy for wealth managers and the family office segment. Among the assignments he has completed are feasibility studies for wealth managers seeking to enter new market segments and geographies, as well as a mapping of the European family office arena. In the course of these assignments Ted has produced strategy studies for fund managers and business solutions providers seeking to penetrate the family office market. Ted is lead consultant for the Scorpio Partnership's industry-leading quantitative Private Banking Benchmark, which is published annually. He also sits on the advisory board of Private Banker International.

Graham Harvey conducts both primary and secondary quantitative and qualitative research and analysis in wealth management at Scorpio Partnership. His recent work has focused on the needs of global family offices and strategic analysis of the global private banking industry. He has focused on the development of green-field propositions and market analysis for solutions providers seeking to enter the family office market. Graham also writes for Scorpio Partnership's HNW, its market leading strategic intelligence newsletter, and the Private Banking Benchmark, its unique analysis and ranking of the top international private banks and high-net-worth wealth managers.

11.30

## How Will Family Offices Evolve?

- Is it best for a family to have a family office?

**Ted Wilson**

Senior Consultant

### SCORPIO PARTNERSHIP

**Grégoire Bordier**

Managing Partner

### BORDIER & CO., PRIVATE BANKERS

In his early forties, Grégoire started his career as an investment analyst at Donaldson, Lufkin & Jenrette Securities in New York, after which he spent several years with Credit Suisse First Boston. He became a partner of Bordier & Cie in 1997. He attained his MBA from Dartmouth College, USA in 1994. He joined the board of Berry Asset Management as a non-executive director in 2001. He is also a board member of Finavest Monaco SAM and Bordier Gestion Privée S.A. He is the president of the association Paint-a-Smile and the treasurer of the Geneva Cancer Association.

**François Mollat du Jourdin**

Managing Partner, Founder

### FINANCIERE MJ – FAMILY OFFICE

François Mollat du Jourdin, a graduate from French business school Audencia in 1985, spent part of his graduation program in a MBA program in the USA. After teaching economics at the French Naval academy, he spent 2 years in Gabon, Africa, as a free lance financial advisor, representing Union Financière de France, a subsidiary of Banque Indosuez. He then returned to Paris to head the international private banking department of Banque de Neufilze, Schlumberger, Mallet (a member of the ABN AMRO Group), a major actor of the private banking sector in France. He developed this activity during 9 years and then joined Merrill Lynch France as Director of Private Banking. In 2002, he launched his own company, Financière MJ – Family Office, the first independent multi-client FO in France.

**Francesco Aletti Montano**

Chief Executive

### ALETTI MONTANO & CO, FAMILY OFFICE

Francesco Aletti Montano, a graduate of Università Luigi Bocconi Milano - Economia Aziendale Granatieri Sardegna, is currently Vice President of UBS (Italia) Spa, President of Aletti Montano & Co. Family Office Srl, and Board Member of Albertini Syz Investimenti Alternativi SGR and Demolli Industria Cartaria. He has 16 years of experience holding different high-level positions within the Aletti Group and has been a member of the board of the Banco Popolare di Verona e Novara Group since 1996.

**Pierre Condamine-Gerbier**

Managing Partner

### REYL PRIVATE OFFICE

In 1994, Pierre joined in London and Guernsey the private office formed by two Franco-Swiss families who were the original shareholders of one of the world's leading commodity trading groups, to act as personal assistant to some of the family members. He then went on to work for a major Greek ship-owning family within its London-based private office and private bank before co-founding Credit Suisse Family Office in London and Zurich as Managing Director. He then created Mandarin Fortune Plc. in London, a multi-client private office whose activity was then absorbed within Banque Bonhôte and the UBS Group in Switzerland where he relocated in 2004. He joined REYL & CIE and REYL Private Office in 2006.

12.15

Lunch

13.15

## Managing Succession Issues - What is the Role of the Adviser?

- How and when should the next generation be integrated in the decision making process
- Issues when passing on a business to the next generation
- Structuring assets and portfolios before a succession

**Grégoire Bordier**

Managing Partner

### BORDIER & CO., PRIVATE BANKERS

13.55

## The Changing Role of the Family Office

- The evolutionary development of a family office
- Specialisation, accountability, regulation & litigation
- The investment management revolution
- The vulnerability of the family company
- Impact of social change

# Wealth Management & Family Office

## Best Practice in Managing the Wealth of Ultra High Net Worth Families

Thursday 28th & Friday 29th February 2008, Zurich

### Michael Maslinski

Director

#### MASLINSKI & CO

Michael is a director of Maslinski & Co Ltd, London based strategy and marketing consultants specialising in the Private Banking and Wealth Management sector. Maslinski & Co has been recognised as the consultancy firm with the best understanding of the wealth management sector, in a survey of 40 European financial institutions, covering 11 different countries. Michael has advised a wide variety of institutions on the development of their services for private clients, ranging from major retail and investment banks to wealth management boutiques and family offices.

### 14.35 Preserving Family Wealth: The Family Office as Risk Manager

- Risk appraisal and description
- Methodology
- Family and governance
- Tax and legal
- Financial
- Strategic asset allocation
- Risk management and risk control

### François Mollat du Jourdin

Managing Partner, Founder

#### FINANCIERE MJ – FAMILY OFFICE

15.15 Coffee Break

### 15.35 How Performance & Philanthropy are Linked

- How emotions relate to performance
- How philanthropy impacts the mind and your happiness quota
- Gaining clarity, avoiding compassion fatigue

### Dr. Tonya Hoffman

Founding Partner

#### LEADING MINDS

Tonya worked in structured derivatives and trade finance at Citibank and was a political analyst for Standard Chartered. Following her career in the City she was awarded a doctorate with distinction from Columbia University, N.Y. with research titled "The Art of Forming Minds." Tonya is a Fellow of the Royal Geographic Society and advisor to SHINE: Support and Help IN Education.

### 16.15 How to Engage in Philanthropy

Panel Discussion

- Philanthropic vehicles
- Concrete cases and examples
- Analysis on the role families attending can play in philanthropy
- Removing obstacles for international philanthropy

### James K. Myers

Founder & Chief Executive

#### EUROPEAN ASSOCIATION FOR PLANNED GIVING (EAPG)

James Myers founded the European Association for Planned Giving (EAPG) in 1998 to provide a cross-border network of philanthropic advisers and charity fundraisers. He is currently the CEO. An American by birth, Jim has lived in Europe virtually all his adult life, mostly in France and latterly in the UK. Prior to launching EAPG, he co-founded and developed a prominent international tax institute.

### Ludwig Forrest

Project Manager

#### KING BAUDOUIN FOUNDATION

Ludwig Forrest is philanthropy advisor at the King Baudouin Foundation in Brussels, established in 1976 to improve people's living conditions. Ludwig works at the KBF's Centre for Philanthropy that provides information, guidance and tailor-made help on strategic philanthropy to private donors, families, businesses and professional advisers who wish to engage in public benefit initiatives. Fostering and simplifying the European cross-border giving environment with the [www.givingineurope.org](http://www.givingineurope.org) website and helping donors and beneficiaries to find effective solutions for philanthropic intentions are his main objectives.

### Simon Weil

Head of Individuals Group

#### BIRCHAM DYSON BELL LLP

Simon Weil, a Partner and Head of Individuals at Bircham Dyson Bell LLP, has lectured on charity trusteeship, charities in the context of tax-planning, the Charities Bill and public benefit. He sits on the Executive Committee of the Charity Law Association and Chairs the European Association for Planned Giving.

### Dr Edgar Paltzer

Attorney-at-Law

#### NIEDERER KRAFT & FREY

Edgar is admitted to the bars of Zurich and New York. He has worked in major law firms in Zurich, New York and Geneva and is a partner of the Zurich based law firm Niederer Kraft & Frey. He is a TEP and member of STEP since 1994 and was until the end of 2006 officer on the Committee of the Swiss German and Liechtenstein Branch. He was until the end of 2006 Chair of the Individual Tax and Private Client Committee of the International Bar Association. He is also an Academician of the International Academy of Trust and Estate Law.

### Etienne Eichenberger

Co-founder

#### WISE PARTNERSHIP

Etienne began his career at Nestlé, followed by the Swiss Agency for Co-operation and Development. Senior Manager in 1999 at the World Economic Forum, Etienne was responsible for the global agenda. He co-initiated the first public debates at the Davos annual meetings. Consultant for the Schmidheiny Group's Avina Foundation and co-founder of Casa Alianza Suisse, Etienne has always privileged ties with international development in his activities within decision-making circles. Etienne has a degree and a Master in International Relations from the University of St. Gallen.

17.15 Close of Day One

## Conference Day Two

09.00 Chairman's Welcome

### 09.10 Diversifying the Portfolio – A Look at Rising Areas of Investment

- What is out there and what fits your families?
- What is impacting wealthy families?
- What strategies can be put in place?

### Felicity A. Keller

Managing Director

Head of Private Wealth Advisory

#### STANFORD GROUP (SUISSE) AG

Felicity brings to Stanford over twenty years top managerial experience in the Private Banking and Family Office arena. She has particular technical expertise in the area of trust and estate planning. Her experience in heading up various trust operations gives her the necessary insight into the varied regulatory environments, and the day to day compliance, administration and planning issues, bringing a pragmatic approach to complex issues. She has extensive experience with all areas of cross-border wealth planning and in particular the concerns of international families whose wealth is inherited or newly created, from varied cultural backgrounds.

### 09.50 Real Estate Investments in Eastern Europe

- The scale of the opportunity
- Returns versus risks
- Choosing partners, deal structures and terms

### Kevin Reid

Managing Director

#### AIG GLOBAL REAL ESTATE

Mr. Reid is responsible for AIG Global Real Estate's European operations. He is responsible for the acquisition, development and management of European real estate and also serves as the portfolio manager for the AIG-sponsored European real estate fund. Mr. Reid joined AIG Investments in 2005. Before joining AIG Investments, Mr. Reid was European Managing Director for The Peabody Fund/O'Connor Capital Partners. In this role he led the acquisitions team, managed the European business including offices in the UK, Milan and Luxembourg, and raised capital for O'Connor European Property Partners.

### 10.30 Switzerland's Role in International Tax Structures for Wealthy Families

- Solutions for individuals taking up residence in Switzerland

- Solutions for international investment structures
  - Taxation of trusts in Switzerland
  - Taxation of real estate in Switzerland
- Dr. Marcel Widrig**  
Partner, Private Clients  
**PRICEWATERHOUSECOOPERS**  
*Marcel has 14 Years of experience with PricewaterhouseCoopers as partner and heading up the private clients business in Switzerland. His focus is international structuring of entrepreneurs with their enterprises and family offices, top managers and private individuals with complex wealth structures.*

11.10 Coffee Break

11.30 **Residence & Citizenship Planning for UHNW Clients**

- Key considerations in international residence planning
- Switzerland as an attractive place for UHNW individuals and families
- Citizenship-by-Investment and other means of acquiring alternative citizenship

**Christian H. Kälin**

Partner

**HENLEY & PARTNERS**

Founding Partner

**VERICA TRUST & CAPITAL MANAGEMENT AG**

*Christian is an internationally known real-estate, tax and estate-planning specialist and a partner at Henley & Partners, Zurich, as well as one of the founding partners of Verica Trust & Capital Management. He is also a member of the Board of the International Financial and Legal Network (IFLN), a member of the Society of Trust and Estate Practitioners (STEP) as well as of numerous other professional organizations such as the IFA, ITPA, FIABCI, etc.*

12.10 **Succession Planning in Switzerland**

**Caroline Garnham**

Partner

**LAWRENCE GRAHAM**

*Caroline's specialist areas include family office and family governance in the ultra high net family, international estate and tax planning, personal tax, trusts and family dispute resolution. She is cited in The Legal 500 2005 edition as a leading individual in her field. Caroline has wide experience of international and domestic tax and estate planning for private clients. She was awarded the fellowship of the Chartered Institute for Tax for her thesis on 'Tax Planning for Non UK Domiciliaries Investing in UK Commercial Property'.*

12.50 **Civil Law/Common Law - Conflict or Harmony?**

- Civil Law inheritance - forced heirship?
- Common Law succession - testamentary freedom?
- Use of trusts - a UK crackdown?
- Renvoi
- EC Commission Green Paper on Succession and Wills
- Into the future....

**James McNeile**

Partner

**WITHY KING**

*James joined Withy King from Farrer & Co in 2006. He heads up the firm's Estate Planning team working from the South West firm's Bath, Marlborough, Swindon and London offices. He specialises in estate planning for private individuals with a particular expertise in tax advice for non-UK domiciled individuals who have a UK tax exposure either through residence here or through the ownership of assets in the UK. James has written chapters for the loose-leaf volumes published by Lexis Nexis Butterworths entitled "Planning and Administration of Offshore and Onshore Trusts" and "Trust Drafting and Precedents" and lectures regularly through IIR and Lexis Nexis Butterworths. He is a member of STEP and of the Holborn Law Society Revenue Committee.*

13.30 Lunch

14.30

**Cross Border Tax & Estate Planning**

- Challenges facing the multi-jurisdictional family
- Management of assets
  - choice of structure
  - choice of jurisdiction
- Tax efficiency
  - of the wealth management structures
  - for the beneficiaries
- Cross border tax planning
- Cross border estate planning
  - tax issues
  - succession issues

**Marilyn McKeever**

Senior Associate

**BERWIN LEIGHTON PAISNER LLP**

*Marilyn is a Senior Associate with City firm Berwin Leighton Paisner LLP. Marilyn has over 25 years experience advising on international and UK estate planning including trust and personal taxation and all aspects of offshore and onshore trusts and Wills. She focuses in particular on estate planning for non-UK domiciled clients, especially those with US connections. Marilyn also advises on charity matters including the establishment of charities and tax efficient charitable giving".*

15.10

**How to Combine Austria, Belgium & the Netherlands for Family Wealth Planning Purposes**

- Highlights of the New Dutch Tax Exempted Holding Company

**Stephan Wijnkamp**

Partner

**HENLEY & PARTNERS**

*Stephan is a Dutch lawyer specialised in international tax law, residence and citizenship law with more than 20 years of experience. After obtaining his doctorate in (tax) law at the university of Tilburg in The Netherlands he started his career at Price Waterhouse in Rotterdam. In 1994 he founded his own law firm specialised in Belgian residence in combination with international tax planning. In 2006 he became Partner at Henley & Partners in Antwerp, Belgium.*

- Highlights of the Austrian Foundation Austrian Holding

**Erich Baier**

Certified Tax Advisor

**BILANZ-DATA WIRTSCHAFTSTREUHAND GMBH**

*Erich is sole shareholder and CEO of Bilanz-Data Wirtschaftstreuhand GmbH, established in 1986, a tax-law firm in Vienna, which concentrates on domestic as well as international tax-planning and providing full-range corporate services. Erich is a member of various international organisations and regularly serves as a speaker at international conferences.*

- Highlights of the Belgian Holding Company & Notional Interest Deduction

**Philippe Van den Broecke**

Partner

**ASTREA**

*Philippe is a partner of Astrea. He is active in the field of the company law and more specifically in the field of mergers and acquisitions. Philippe graduated from the Vrije Universiteit Brussel (1993) and is member of the Bar of Brussels since October 1993.*

15.50

**How to Combine Companies & Foundation of these Jurisdictions to Achieve Family Wealth Planning Benefits**

*Moderated by:*

**Stephan Wijnkamp**

Partner

**HENLEY & PARTNERS**

16.15

End of Conference

Panel Discussion

# Pre-conference Workshop

Wednesday 27th February, Renaissance Hotel Zurich

## International Residence & Citizenship Planning for UHNWI

Workshop led by Henley & Partners

- Key points to consider in international private client relocation
- Why pre-immigration tax planning is important
- Wealth planning for the global citizen
- Citizenship-by-Investment - What is available today and how to use this tool in private client planning
- Residence and Citizenship-by-Investment in Austria
- The UK's Investor Immigration Program
- International health insurance for UHNW clients – a key element in international residence planning

Registration at 13.30

Workshop starts at 14.00

Workshop ends at 17.00

*With contributions from:*

**Christian H. Kälin** is an internationally known real-estate, tax and estate-planning specialist and a partner at Henley & Partners, Zurich, as well as one of the founding partners of Verica Trust & Capital Management, Zug, an investment advisory firm. He is also a member of the Board of the International Financial and Legal Network (IFLN), a member of the Society of Trust and Estate Practitioners (STEP) as well as of numerous other professional organizations such as the IFA, ITPA, FIABCI, etc

**Dr. Manfred Strasser** is an expert in Austrian real estate, residence and citizenship law and the head of Henley & Partners' office in Austria. After graduating with a doctorate in civil law from the University of Vienna in 1976 he had his own law firm for 20 years, specialised in real estate, immigration and corporate law. Later he moved into real-estate investing and developing with his own company in Austria. He is the senior adviser of the Austria Real Estate Fund based in Vienna, and a member of Henley & Partners' International Citizenship Practice Group. Dr. Strasser-Kleeber has been advising foreign clients on real estate investments, residence and citizenship matters for many years, and he is the leading advisor in Austria for applications under Austria's citizenship-by-investment provisions.

**Jonathan K. Chalmers** is an associate with Henley & Partners in Zurich, and a member of the firm's International Residence and Citizenship Practice Group. In 1989 he joined David Garrick Limited, a consultancy which provided services to overseas business investors and companies. Here he specialised in alternative citizenship and residence solutions for private clients and work permit representation for multinational corporations. In 1993 he worked with accountancy group Allott Pearson International's tax division in the same area and from 1995 until 2004 he ran his own consulting company. He has authored many articles on citizenship-by-investment programs and is active in both private client and government consulting work in that area.

**Hakan Cortelek** is the head of HSBC Private Bank (UK) Ltd 's Immigration Services Department and he is a Senior Member of HSBC Global Investor Immigrant Services. Hakan's diverse work experience and personal background is well suited for his role as the Associate Director of Immigrant Investor Programmes. Hakan immigrated to Canada and worked for 7 years at the Relationship Banking Centre, where he held the position of Financial Planning Advisor and Portfolio Manager in his last role in Vancouver. Hakan has been living in London since 2004. He joined HSBC Bank in February 2005. His personal experiences in both countries, coupled with his financial planning background, has been instrumental in advising on Canadian and UK immigrant Investor Programs.

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# Wealth Management & Family Office Zurich 2008

28th & 29th February 2008, Renaissance Hotel Zurich

International Residence & Citizenship Planning for UHNWI, Pre-conference Workshop, 27th February 2008

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## HOW MUCH?

### Register by 25th January 2008

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<input type="checkbox"/> Conference Only (KM1965C)	£1399 (SAVE £100)
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### Register After 25th January 2008

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Savings include Multiple Booking & Early Booking Discounts. All discounts can only be applied at the time of registration and discounts cannot be combined. All discounts are subject to approval. Please note the conference fee does not include travel or hotel accommodation costs. £200 discount for 3rd and subsequent delegates.

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## Additional Requirements

Please notify IIR at least one month before the conference date if you have any additional requirements e.g. wheelchair access, large print etc.

## WHEN AND WHERE

### KM1965

Thursday 28th & Friday 29th February 2008, Zurich

Delegates are responsible for the arrangement and payment of their own travel and accommodation.

### Venue:

Renaissance Hotel Zurich  
Talackerstrasse 1 Zurich-  
Glattbrugg 8152 Switzerland

T: 0041 448745000

F: 0041 448745003

## PERSONAL DETAILS

### 1st Delegate Mr/Mrs/Ms

Job title \_\_\_\_\_ Department \_\_\_\_\_  
Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
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Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_

Yes! I would like to receive information about upcoming events by email. By giving you my email address I am giving ONLY IIR companies the permission to contact me by email

### 3rd Delegate Mr/Mrs/Ms

Job title \_\_\_\_\_ Department \_\_\_\_\_  
Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_

Yes! I would like to receive information about upcoming events by email. By giving you my email address I am giving ONLY IIR companies the permission to contact me by email

### Name of your Line Manager Mr/Mrs/Ms

Job title \_\_\_\_\_ Department \_\_\_\_\_  
Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_

### Booking Contact Mr/Mrs/Ms

Job title \_\_\_\_\_ Department \_\_\_\_\_  
Telephone \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_

Our statement of integrity can be found on our website at <http://www.iir-events.com/IIR-conf/PrivacyPolicy.aspx>

## COMPANY DETAILS FOR INVOICING PURPOSES

### Company Name

Postal Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Nature of Business \_\_\_\_\_

Billing Address (if different from above address) \_\_\_\_\_

Billing E-mail Address: \_\_\_\_\_

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**What Happens If I Have to Cancel?** Confirm your cancellation in writing two weeks before the event and receive a refund less 10%+VAT service charge. Should you cancel between one and two weeks prior to the event, you will receive a refund less 50%+VAT service charge. Regrettably, no refunds can be made for cancellations received less than 7 days before the event. A substitute is always welcome at no extra charge.