Wealth Management & Family Office Congress 2007

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

Largest line-up of **Family Office & Wealth Management** experts:

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Executive Chairman
SAND AIRE

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

Nick Ring
Head of Wealth Management Services EMEA
NORTHERN TRUST

Grégoire Bordier
Managing Partner
BORDIER & CO., Private Bankers

Sebastian Dovey
Managing Partner, Founder
SCORPIO PARTNERSHIP

Anton Sternberg
Executive Director
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James Tipping
Finance Centre Director, Ministry of Finance
GOVERNMENT OF GIBRALTAR

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Senior Associate
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Head of Asset Allocation
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Simon Lough
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Francesco Aletti Montano
Chief Executive
ALETTI MONTANO & CO, FAMILY OFFICE

Guy Hurley
Managing Director
MERRILL LYNCH

Antony John
Managing Director
IMS LTD

Conference Chairman:
Michael Maslinski
Director
MASLINSKI & CO

- The Family Office & the role it plays PLUS! **Case study:** Setting up a Family Office
- **Multiple family office vs. private bank** in delivering client service
- **Preserving family wealth:** the Family Office as a risk manager
- Which family office services should be handled in-house and which are better **outsourced**?
- Cross border **tax & estate planning**
- **Trusts**: market developments & recent international cases
- **Real-estate investments** in Eastern Europe
- Is is best for a family to have a Family Office?

Plus! 2 Pre-conference Workshops

Morning - Wednesday 20th June 2007
1. Succession Planning for Very High Net Worth Families

Afternoon - Wednesday 20th June 2007
2.UK Resident Non Domiciles Tax Planning

Led by: Herbert Smith

Thursday 21st & Friday 22nd June 2007
Rembrandt Hotel, London

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Pre-conference Workshops

Wednesday 20th June 2007

Workshop 1 - morning

Succession Planning for Very High Net Worth Families

This half-day morning workshop will analyse the following key issues:

- Why is succession planning important?
- Why do families find it difficult?
- Why do things go wrong?
- How to avoid litigation
- What are the options?
- What are the opportunities?
- Important cases
- Case Study

Your Workshop Leader

Rupert Ticehurst joined Herbert Smith as a partner in 2005 to develop the firm's top-tier contentious trusts practice and its international non-contentious trusts work with a particular emphasis on Middle Eastern clients. He joined Herbert Smith from Baker & McKenzie where he established a strong market reputation particularly with international banks. The Chambers UK directory 2005 recognised him as "highly regarded in his field" and Legal 500 regarded him as being a "rising star". Rupert is a member of the Association of Contentious Trusts and Probate Specialists.

Workshop 2 - afternoon

UK Resident Non Domicile Tax Planning

This half day afternoon workshop will explore the following:

- Maintaining your desired Domicile
- Why does Domicile matter
- Tax advantages of non-uk domicile
- Paying tax, the choice is yours
- Common problems
- Simple solutions

Your Workshop Leader

Michael Wood is a consultant in the Trust and Charities Group of Herbert Smith, London. He is a solicitor, member of the chartered Institute of Taxation and STEP and an MBA graduate who has completed the Harvard course in Leadership of professionals services firms. He was managing partner of Bircham Dyson Bell and has spent his 30 year career dealing with all aspects of private client work. He is a past editor of the Practice column in Longmans capital tax planning and a regular contributor to journals. He lectures regularly and leads a course on private client work at the College of Law.

Workshop Timings

09.00 Registration for workshop 1

09.30 – 12.30 workshop 1

13.00 Registration for workshop 2

13.30-16.30 workshop 2

Lunch will be served for workshop participants between 12.30-13.30.

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Wealth Manag

Conference Day One
21st June 2007

08.30 Registration & Morning Coffee

09.00 Chairman's Welcome & Opening Address
Michael Maslinski
Director
MASLINSKI & CO

09.10 **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

09.40 **Strategic Positioning of the Family Office Business**
- The Family Office model
- Family governance
- Appropriate uses of the model

Anton Sternberg
Executive Director
STONEHAGE LTD

10.10 **Understanding your Client's Risk Profile & Managing Expectations**
- What does your client want?
- Balancing the portfolio
- Reporting on the portfolio
- Expectations of the family

Percival Stanion
Head of Asset Allocation
BARING ASSET MANAGEMENT

10.40 Q&A Session

10.50 Morning Coffee

11.10 **Getting the Right Balance between Selling Products & Delivering Advice**
- Thin line between proactive advice and product selling
- Client perspective
- Skills and training requirements
- Culture, organisation and management

Michael Maslinski
Director
MASLINSKI & CO

11.40 **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?

Sebastian Dovey
Managing Partner, Founder
SCORPIO PARTNERSHIP

Panel Discussion

12.10 **How Will Family Offices Evolve?**
- Is it best for a family to have a Family Office?

Panellists include:

Sebastian Dovey
Managing Partner, Founder
SCORPIO PARTNERSHIP

Simon Lough
Director, Client Services
HEARTWOOD WEALTH MANAGEMENT

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

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

12.55 Lunch

14.00 **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

14.30 **What Family Office Services should be Handled In-house & Which are Better Outsourced?**
- What are the services - wide and varied!
- What are the different issues for consideration
- How do you decide which services to keep and which to outsource

Nick Ring
Head of Wealth Management Services EMEA
NORTHERN TRUST

15.00 **Tax Issues for Wealth Management & Investment Strategies**
- International Tax developments
- Recent Budget changes and other updates
- Tax issues for investing in alternative investments
- Tax advantaged investing

Mike Beattie
Partner
SAFFERY CHAMPNESS

15.30 Q&A Session

15.40 Coffee Break

16.00 **Preserving Family Wealth: The Family Office as a 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

16.30 **Onshore vs. Offshore - in Delivering Long Term Business Success**
- Existing challenges for offshore wealth managers
- Where are we seeing offshore offering the most value?

James Tipping
Finance Centre Director, Ministry of Finance
GOVERNMENT OF GIBRALTAR

Panel Discussion

17.00 **Philanthropic Solutions**
- Latest developments in setting up charities
- Foundations – complying with the rules and regulations
- Reporting regulations
- What alternative structures exist?

Moderator:
James K. Myers
Founder & Chief Executive
EUROPEAN ASSOCIATION FOR PLANNED GIVING (EAPG)

Panellists:
Ludwig Forrest
Project Manager
KING BAUDOUIN FOUNDATION

Moira Protani
Partner and Head of Charity Law Group
BERWIN LEIGHTON PAISNER LLP

17.40 Close of Day One

Conference Day Two

22nd June 2007

09.00 Chairman's Welcome

09.10 **Case Study: Setting up the Family Office - A View from the Inside**
- Why we set up a family office - how this best suited our needs
- Roles of the various advisors, members
- Was this the right decision?

Penny Lovell
Group Head of Business Development
FLEMING FAMILY & PARTNERS LTD

09.40 **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

10.10 **Succession Planning in Switzerland**
Caroline Garnham
Partner
LAWRENCE GRAHAM

10.40 Q&A Session

10.50 Coffee Break

11.10 **Planning for Middle East Families**
- Shari'a inheritance rules
- Shari'a investment rules
- Are trusts compatible?
- What about other structures
- Planning opportunities and pitfalls

Rupert Ticehurst
Partner
HERBERT SMITH

11.40 **Trusts – Market Developments & Recent International Cases**
- Roundup of recent, most interesting cases

Paul Stibbard
Partner
BAKER & McKENZIE, Zurich

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

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

James McNeile
Partner
WITHY KING

12.40 Q&A Session

12.50 Lunch

14.00 **With the Globalisation of the Wealth Industry How Important is Branding in the Wealth Arena?**

- Recent sector developments
- What are the consequences for the smaller players?
- What are the competitive options?
- How do you brand yourself to survive?

Ian Ewart
Head of Marketing & Communications
BARCLAYS WEALTH

14.40 **Real-Estate Investments in Eastern Europe**

- Where can you still find opportunities?
- Croatia as a prime example
- How to tap Croatia's value without the risks

Christian H. Kälin
Founding Partner
VERICA TRUST & CAPITAL MANAGEMENT AG

15.10 **Impact of the Global Investment Environment on Wealthy Families**

- Worldwide look at investments and alternative investments - what is out there and what fits your families?
  - Hedge funds – performance and predictions
  - Private equity
  - Property
  - Art / Antiques
- What is impacting wealthy families?
- What strategies can be put in place?

Guy Hurley
Managing Director
MERRILL LYNCH

15.40 Q&A Session

15.50 Coffee Break

16.10 **Global Asset Allocation & Manager Selection**

- What is involved?
- Is it strategic?
- What does it cover?
- Who should be doing it?
- Who shouldn't be doing it?

Antony John
Managing Director
INVESTMENT MANAGER SELECTION LTD

16.40 **Citizenship-by-Investment as a Tool in International Wealth Planning**

- The benefits of acquiring second citizenship
- Residence planning
- The citizenship program of St Kitts & Nevis

Wendell Lawrence
Partner
HENLEY & PARTNERS, St. Kitts & Nevis Office

17.10 End of Conference

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Wealth Management & Family Office Congress 2007

Thursday 21st & Friday 22nd June 2007, Rembrandt Hotel, London

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

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KM1893
Thursday 21st & Friday 22nd June 2007,
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