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Dr. Steen Ehlern
FERGUSON PARTNERS FAMILY OFFICE

Jonathan Bell
STANHOPE CAPITAL

Andrew Nolan
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PRIVATE BANKS

Penny Lovell
ROTHSCHILD

Tania Kabbani
BANK MED

Dr. Ariel Sergio Goekman
CREDIT SUISSE

WEALTH ADVISORY

Michael Maslinski
MASLINSKI & CO

Håkan Hillerström
HAKAN HILLERSTROM FAMILY BUSINESS ADVISORY

Matthias Memminger
PRICEWATERHOUSECOOPERS

Kripa Sethuraman
FAMILY OFFICE EXCHANGE

Plum Lomax
NEW PHILANTHROPY CAPITAL

Alistair Reid
THORNHILL INVESTMENT MANAGEMENT

Christiano Puglia
VOLCON SA

Stephen Robertson
MACQUARIE GLOBAL INVESTMENTS

Bruce Weatherill
BRUCE WEATHERILL EXECUTIVE CONSULTING

Pierre-Alain Guillaume
CHABRIER & PARTNERS

Christian H. Kälin
HENLEY & PARTNERS

Highlights for 2010:

Family Office Roundtable


Carol Pepper
President
PEPPER INTERNATIONAL


Pierre Condamin-Gerbier
Managing Partner
REYL PRIVATE OFFICE


Dr Rico Baumgartner
Managing Director
BAUMGARTNER FREY FAMILY OFFICE


Dr. Steen Ehlern
Managing Director
FERGUSON PARTNERS FAMILY OFFICE

Governance Issues in Family Offices & Family Businesses


Håkan Hillerström
Principal
HAKAN HILLERSTROM FAMILY BUSINESS ADVISORY

Key Issues from the Financial Crisis: The day-to-day Investment Life of an MFO


Jonathan Bell
CIO
STANHOPE CAPITAL

Developing a Strategy Framework for a Family Office


Michael Maslinski
Director
MASLINSKI & CO

Topical presentations on the following:

Operations

- Understanding HNWs Thought Process in Choosing their Advisors Today
- A Practical Perspective on Building Trust with your Client
- Making Philanthropy Central to your Role as Trusted Advisor
- Residence & Citizenship Planning for UHNW Clients
- Do Family Offices Provide Value for Money?
- Setting up a Family Office
- Rethinking the Family Office Operational Set up Post Credit Crisis

Investment

- Latest Thinking in Investment Management & Best Practice Global Strategies
- Focus on Asia
- Swiss Annuities – A Secure Way to Invest
- What do Wealthy Entrepreneurs Do These Days?
- Protecting Yourself against another Madoff / Schmitt

Post-conference Workshop

International Residence & Citizenship Planning for UHNW Clients

Thursday 18th March 2010, Renaissance Hotel, Zurich

Tuesday 16th & Wednesday 17th March 2010, Renaissance Hotel, Zurich

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Wealth Manag

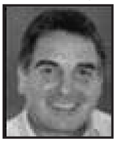
CONFERENCE DAY ONE • 16th March 2010

08:30 Registration & Coffee

09:00 Chairman's Welcome & Keynote Address:

Developing a Strategy Framework for a Family Office

- Defining core objectives to match family circumstances
- Realistic definition of key functions within appropriate budget
- Balancing in house and external advice to optimise expertise and independence
- Recruiting key personnel



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. 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. He is author of numerous articles on the wealth management industry and is frequently quoted in the financial press as a leading authority on the sector. Prior to establishing his own consulting firm in 1995, he was Head of Marketing and Business Development at Coutts, where he had over 20 years practical experience of private banking.

09:35

The Day to Day Life of a MFO after a Historic Storm: What Has Changed?

Reflecting on the main consequences of the last two years, what we at Reyl have experienced and what new key questions we are facing from our clients today.

- FOs: the future has never been so bright!
- Avoidance of conflicts of interest or the end of the "financial family office"
- A move towards transparent tax planning
- A come back to tangible assets
- Diligence, governance and asset consolidation: the new pillars

Pierre Condamin-Gerbier
Managing Partner
REYL PRIVATE OFFICE

In 1994, Pierre Condamin-Gerbier 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. Pierre 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.

Panel Discussion

10:10

Family Office Roundtable

- How have family office operating practices changed post the recent financial crisis?
- What new risk management strategies have been implemented and how are the clients reacting to these strategies?
- What are the new client concerns in the post-crisis world and how are family offices addressing these?

Carol Pepper
President
PEPPER INTERNATIONAL

Carol Pepper is President of Pepper International, a family office located in New York City. She has over 20 years experience in the wealth management industry. Carol was named a 2007 Rising Star in Wealth Management by Institutional Investor News. Prior to forming Pepper International in 2001, Carol had extensive experience as a private banker at JP Morgan Private Bank, Citibank Private Bank and Credit Suisse Private Bank. She also managed over $1 billion of private client assets as a Senior Relationship Manager and Portfolio Manager at Rockefeller & Co., the multi-family office founded by the Rockefeller family. Carol also worked on the creation of a web-based virtual family office as a Principal at Morgan Stanley.

Dr Steen Ehlern
Managing Director
FERGUSON PARTNERS FAMILY OFFICE

Steen advises families, UHNWIs, family offices and specialist advisors on the set-up of family office solutions, ideas, introductions, the selection of multi-client family offices and various providers, real estate projects and investments. He covers strategic family matters as well as succession planning and mergers & acquisitions of smaller private banks and asset managers and strategic investments and de-investments.

Dr Rico Baumgartner
Managing Director
BAUMGARTNER FREY FAMILY OFFICE

Dr. Rico Baumgartner is in charge of the Baumgartner Frey Family Office and operationally manages several private equity investments. Rico Baumgartner was Head Special Desks (entrepreneurs, athletes and artists) of Credit Suisse Private Banking, Head Project Finance Swiss Re, Risk Manager of Dr. Stephan Schmidheiny and the Turn-around Manager of one of his PVC companies in Latin America, CFO of a Venture Capital company and legal counsel of ABB.

Pierre Condamin-Gerbier
Managing Partner
REYL PRIVATE OFFICE
(See bio previously)

10:50 Break

11:15

Governance Issues in Family Offices & Family Businesses

- Is there enough glue and passion in the family?
- Governance procedures, the importance of an inclusive process
- Shareholders Agreements, Family Constitutions
- Board and Family Councils
- Who controls whom? – checks and balances
- What about multi-family offices?

Håkan Hillerström
Principal
HAKAN HILLERSTROM FAMILY BUSINESS ADVISORY

Born into a family shipping business in the south of Sweden, Mr. Hillerstrom bears with him unique knowledge and insights into family business issues. Honed in private banking through Banque Kleinwort Benson, Mr. Hillerstrom further specialised his know-how of family business and family office complexities with PricewaterhouseCoopers. His knowledge has proved especially valuable to families experiencing internal conflict. Working with the entire family on a person-to-person basis Mr. Hillerstrom also understands the aims of the younger generations, and assisting them in the move to leadership or ownership positions. As a neutral coach he is able to help the family find solutions that are acceptable to all family members.

11:50

Make Way for the New Generation: Working with Young Clients & Staff Members

- Overview of the generational shift in the workforce
- Boomers vs. Gen X vs. the Millennials
- Managing and developing the next generation of staff
- Connecting with and servicing the next generation of clients

Carol Pepper
President
PEPPER INTERNATIONAL
(See bio previously)

12:25

Understanding HNWs Thought Process in Choosing their Advisors Today

- What do families want from their advisors?
- The changing expectations of HNWs – particularly the demands of young HNWs vs. older generations
- How can wealth managers differentiate themselves
- The importance of brand and reputation
- Full discretionary investment management vs. advisory management

Penny Lovell
Director
ROTHSCHILD PRIVATE BANKING & TRUST
Penny is a Client Director at Rothschild, responsible for advising private clients, families, trusts and charities. Prior to joining Rothschild Penny was Group Head of business Development at Fleming Family and Partners from 200-2009. Her extensive client responsibilities covered financial planning, next generation training, philanthropy and Family Office services. From 1995-2000, Penny was Offshore and Inheritance Tax Adviser to the Trust Department at Coutts & Co and prior to this, worked as Broker Consultant on Pensions, Life Assurance and Investment at Friends Provident.

13:00 Lunch

14:00 Should HNWs Consider Relocating to Switzerland?

- Tax optimisation for HNWs taking up residency in Switzerland (lump-sum taxation)
- How to get a residence permit
- Inheritance tax planning in Switzerland
- Choice of law (matrimonial law and inheritance law)

Pierre-Alain Guillaume
Tax Lawyer, LL.M
CHABRIER & PARTNERS
Pierre-Alain Guillaume is the partner in charge of the Chabrier & Associate tax group. After obtaining his attorney's certificate in Geneva in 1995, Pierre-Alain Guillaume joined the tax department of Arthur Andersen in Geneva. From 1999 he worked with attorneys Oberson in Geneva and Lausanne, where he became a partner in 2004. He founded GLM Avocats in 2007. He joined Chabrier & Associés in 2009, for which he has created and heads up the tax group.

14:35 Setting up a Family Office

- Key challenges and advantages in setting up a family office
- Understanding when is the right time to set up a family office; Choosing between a SFO and MFO
- Differences in types of family office structure
- Where to locate your family office
- Purposeful management of family wealth - family decision-making
- Operational issues – hiring staff etc

Kripa Sethuraman
Managing Partner, International
FAMILY OFFICE EXCHANGE
Kripa Sethuraman leads Family Office Exchange's international client relationship management and content and insight development efforts as Managing Partner, International. In this role, Kripa works closely with UHNW families on issues ranging from governance, family office operations, asset allocation, and succession planning, on a one-on-one basis, as well participating at broader FOX member and industry meetings.

15:10 Rethinking the Family Office Operational Set up Post Credit Crisis

- We are seeing less complex structures, more transparency
- What risks have come to light
- Setting up an efficient tax structure for your family office
- Servicing the family office – third parties and security of assets
- Cross-border family office - providing a second hub / safe haven
- Setting up shop with a banking license – what protection does this give the family

Matthias Memminger
Partner
PRICEWATERHOUSECOOPERS AG
Matthias Memminger has been working as a management consultant since 1995 (Mitchell Madison Group, Accenture and b&m management and now with PRicewaterhouseCoopers). Matthias works in Private Banking and Asset Management where he has assisted European Private Banks and Asset Managers on a wide range of topics around strategy alignment, acquisitions, market entry, operating model review, sourcing options and cost reduction topics. In the Family Office arena he has Assisted FOs in the set-up phase, reviewing operating models, and the strategic development of 3rd party provider to FO.

15:40 Break

16:00 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
Christian H. Kälin, a Partner at Henley & Partners in Zurich, is an international tax planning, residence and citizenship specialist. He is a frequent writer and speaker on these issues and is regularly quoted in the international media. He is the editor and one of the co-authors of the Switzerland Business & Investment Handbook and the International Real Estate Handbook as well as one of the co-editors of Anti-Money-Laundering: International Law and Practice.

16:35 Making Philanthropy Central to your Role as Trusted Advisor

- The landscape of philanthropy advice – what advisors are doing
- Understanding why philanthropy should be central to your business
- What clients need from their trusted advisors
- Measuring impact – how your clients can achieve more with their giving

Plum Lomax
Senior Consultant
NEW PHILANTHROPY CAPITAL
Plum leads on NPC's relationships with intermediaries, including private banks, lawyers and family offices. She also manages NPC's website, and is responsible for developing new tools and approaches to disseminate our research. Plum previously worked in the City at Merrill Lynch, where she was Head of European Equity Strategy. Examples of recent projects she has completed at NPC include: Co-ordinating and disseminating the research undertaken by Scorpio Partnership on the role of advisors in offering philanthropy services to their high net worth clients. A consultancy project for a leading global private bank who wanted to determine whether and how to offer philanthropy services to its ultra high net worth clients. Training private client advisors on how to support their clients' philanthropy needs.

17:10 Close of Day One Followed by Drinks Reception

CONFERENCE DAY TWO • 17th March 2010

09:00 Day Two Chairman's Welcome:

Jonathan Bell
Chief Investment Officer
STANHOPE CAPITAL
Jonathan is Chief Investment Officer of Stanhope Capital, one of Europe's leading Multi-Family Offices based in London and Geneva. He has 20 years experience in investment management and was formerly Chief Investment Officer of Newton Private Investment Management.

09:05 Asset Allocation in Practice for a Multi Family Office

- The implications of investing for families with differing needs
- The importance of tactical allocation
- Is strategic allocation dead?
- What we are doing today
- The day-to-day investment life of a MFO

Jonathan Bell
Chief Investment Officer
STANHOPE CAPITAL
(See bio previously)

09:45 A Practical Perspective on Building Trust with your Client

- How does the client view his relationship manager today?
  - Background
  - Where we stand
  - The image of the relationship manager today
- What are the criteria for private banks/wealth managers in ensuring they deliver trust and credibility to their client?

- Client segmentation
- Open architecture
- Approach
- Transparency & Communication
- Extra reassurance
- How can you demonstrate you are really listening to your client?
  - The consultative approach
- Managing your clients assets today - what do they expect from you?
  - Going back to basics
  - The onshore banks' challenge

Tania Kabbani
Head of Department
BANK MED

10:25 **Finding the Right Banking Strategy for International Families**

Andrew Nolan
Executive Director and Head of Private Clients
STONEHAGE GROUP
Andrew is an Executive Director of the Stonehage Group. He is Head of the Private Client Division and acts as lead advisor to a number of wealthy international families. Andrew joined Stonehage in 1997 in the London office and was then transferred to head up the Neuchâtel office in 1998 and to oversee the takeover of another multi-family office. He assisted in profitably growing this office to 110 people. Andrew then moved to Zurich in 2007 in order to be based in the newly opened Stonehage Zurich office.

11:05 Break

11:30 **Protecting Yourself against another Madoff / Schmitt**

- Who will get stung if there is another Madoff / Schmitt?
- *"If people lose money, providers are responsible and must replace client assets"*
- What is the solution for service providers?
- How can service providers avoid exposure?
- How can you make sure your FO does not succumb to fraud
- How can it be structured so client assets can't be lost – is there a way?

Alistair Reid
COO
THORNHILL INVESTMENT MANAGEMENT
Alistair Reid is a Chartered Accountant who has been working in the financial services industry for 30 years, primarily in investment management and banking, and securities accounting and processing. He is currently the Chief Operating Officer of Thornhill Investment Management Limited. His experience includes all aspects of mutual funds, including accounting, pricing, custody and registration and sub-custodian and depository due diligence.

12:05 **What do Wealthy Entrepreneurs Do These Days?**

- Key investments and strategies in play
- Understanding the decision making process of the family or HNW
- A look at the vehicles and structures in use today

Dr. Ariel Sergio Goekman
Managing 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.

12:45 Lunch

14:00 **Swiss Annuities – A Secure Way to Invest**

- Mistrust in banks has led to a rise in other avenues of investment
- Exploring the value which exists in Swiss annuities
- How Swiss annuities can be an attractive alternative for asset protection
- Detailing the benefits
  - Strong currency performance
  - Returns
  - Tax advantages

Christiano Puglia
Director
VOLCON SA
Christiano graduated in 2006 from Business School in Zug/Switzerland and then joined an internationally known investment management firm in Zug. After two successful years in client relations at that firm, he joined Swiss Annuity Consulting Group and subsequently Volcon in January 2009.

Panel Discussion

14:40 **Latest Thinking in Investment Management & Best Practice Global Strategies**

- Which opportunities suit the client in which circumstances?
- Knowing your client and identifying the right strategies for them
- What types of alternative investments exist globally?
- Hedge funds – FoFs / managed accounts / manager selection
  - Art
  - Oil
  - Gold
  - Cash
  - Emerging markets
  - Special opportunities: Iran, China

Stephen Robertson
Executive Director
MACQUARIE GLOBAL INVESTMENTS
Stephen is an Executive Director in Macquarie Global Investments with responsibility for global distribution with a focus on Family Offices and Private Banks. Prior to this he ran the Investment Lending Division for Macquarie banking with $7b under investments in loans and structured products. He has over 18 years experience in Investment Management working with Rothschild Asset Management and JP Morgan Investment Management in Australia and Citigroup Asset Management in Asia. He is a Chartered Accountant and started is career at Arthur Andersen & Co and specialised in advising High Net Worth families and individuals.

Håkan Hillerström
Principal
HAKAN HILLERSTROM FAMILY BUSINESS ADVISORY
(See bio previously Day 1)

More panellists to follow…

15:20 Break

15:40 **Do Family Offices Provide Value for Money?**

- Are family offices trusted advisors or back office?
- Ensuring that you demonstrate value as a family office
- How do you know that you are providing client satisfaction?
- How effective and efficient is your MFO?
- Recognising your own value proposition
- Demonstrating that as a family office, you are the best and that you have the best talent

Bruce Weatherill
BRUCE WEATHERILL EXECUTIVE CONSULTING
Bruce is a Chartered Accountant with Financial Services Industry experience gained from over 33 years with PwC where he was a Partner for 20 years, a trusted advisor to a number of PwC's global clients and Global Leader of the PwC Private Banking/ Wealth Management Practice. From July 2008, upon leaving PwC, Bruce has formed his own consultancy to provide consulting services to Boards and Senior Executives of Wealth Managers, Family Offices and Investment Managers around the world.

16:20 **Why Asia Is a Key Focus**

- Asia – growth market & why
- Examining Asia's legal infrastructure – pros and cons
- Setting up a family office in Asia – Hong Kong / Singapore – what trends are we seeing and why

Speaker to be confirmed.

17:000 Close of Conference

Post-conference Workshop
18th March 2010, Renaissance Hotel, Zurich

International Residence & Citizenship Planning for UHNW Clients

An expert line up of speakers from Henley & Partners will be speaking at this highly valuable half day workshop, offering advice and best practice for private clients who are looking to relocate for either business or personal reasons.

Through a series of presentations and interactive discussions, this always topical and well attended workshop is designed to help you advise and keep abreast of the key issues on an international scale involved in residence & citizenship planning for your UHNW clients.

Speakers will further provide guidance on residence and citizenship planning for the global citizen who may be taking their assets and activities worldwide.

Key points to be discussed during the workshop include:

- 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
- Residence and citizenship in Belgium
- International health insurance for UHNW clients
  - A key element in international residence planning

Workshop led by Henley & Partners:

Christian H. Kälin, a Partner at the firm in Zurich, Switzerland, is an international tax planning, residence and citizenship specialist. He is a frequent writer and speaker on these issues and is regularly quoted in the international media. He is the editor and one of the co-authors of the Switzerland Business & Investment Handbook and the International Real Estate Handbook as well as one of the co-editors of Anti-Money-Laundering: International Law and Practice.

Jonathan K. Chalmers is an Associate with Henley & Partners based in the UK. After graduating from the University of Liverpool he joined the UK Immigration and Nationality Directorate where he was responsible for immigration policy on work permits and business investors. He then worked with several well-known private client firms, where he gained experience in immigration law and residence planning, and also citizenship issues. He has authored many articles on citizenship-by-investment and is active in both private client and government consulting work in that area.

Leon van der Heiden, a Partner and Head of the firm's Belgian office in Antwerp, has wide-ranging experience in corporate and financial affairs and in particular real estate. As a member of the firm's Residence and Citizenship Practice Group he advises on relocation to and residence in Belgium for Non-EU nationals and handles all aspects of clients interested in moving to Belgium

Registration at 8:30
Workshop Commences at 9:00
Workshop ends at 13:00

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Navin C. Shah, PSJ Alexander & Co

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Carrie Tucker, Exploration Capital

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18 March 2010, Renaissance Hotel, Zurich

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WHEN AND WHERE

KM3165c
16 & 17 March 2010

KM3165w
18 March 2010

Venue: Renaissance Hotel, Zurich
Talackerstrasse 1
Zurich - Glattbrugg 8152
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