



Family Office &
Wealth Preservation

HOW TO AVOID
GETTING POOR

AFTER HAVING BEEN RICH

The main mistakes to do away with

Conference Venue: Warwick Hotel
14 Rue de Lausanne, Geneva

April 22nd & 23rd 2009

Conference Chairman:



Dr Steen Ehlerm
Managing Director
**Ferguson Partners
Family Office**
(Switzerland)

With the collaboration of:



Mr Francis Akpata
Director
Plymouth Capital
(United Kingdom)

Lead Sponsor



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Head of M&G European Equities,
M&G Investments

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Managing Director,
Ferguson Partners Family Office

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Managing Partner,
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Mr Fred Fruitman (United States)
Managing Partner,
Loeb Partners

Mr Michiel van der Klooster (Netherlands / United Kingdom)
Managing Director,
Klooster Capital Holding NV

Mr Jean Carl Cohen (Switzerland)
Founder,
Shagya Capital

Programme

DAY ONE 22nd April 2009

09:00 Chairman's welcome & opening remarks

Dr Steen Ehler (Switzerland)
Managing Director
Ferguson Partners Family Office

09:10 Operating Models

- Single Family Offices and Multi Family Offices structures
- Leadership Models
- Attracting and retaining (key) staff

Dr Steen Ehler (Switzerland)
Managing Director
Ferguson Partners Family Office

09:55 An overview of the current market situation and what family offices should do now:

- The crisis in the banking system: a liquidity or a solvency problem?
- At least three crisis at once with chaos and uncertainty spreading into the real economy
- Will the G20 decisions further increase the chaos or clarify the situation?
- What family offices should do in this market environment

Dr Christian Raubach (Switzerland)
Managing Partner
Wegelin & Co

10:40 Coffee break

11:00 Strategic asset allocation: What are the determining factors when family offices incorporate hedge funds into their portfolio in 2009?

- Are hedge fund managers able to deliver alpha in this climate
- Has the benchmark changed?
- What are the winning hedge fund strategies?
- How to take advantage of the increased volatility resulting from the credit crunch and lack of market liquidity.
- Exposure to counterparty risk and managing balance sheets

Mr Armin Vogel (Switzerland)
Managing Partner
Primores AG

11:45 Why invest in Europe

- Macro view on European market
- Investment opportunities

Mr Giles Worthington (United Kingdom)
Head of M&G European Equities
M&G Investments

12:30 Lunch

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14:00 Investing in recession

- Bankruptcy and distressed investments (combining hedge funds and private equity)
- Energy and commodities
- Infrastructure finance
- Undervalued products and industries
- The demand and supply for gold, art and investing in agriculture
- Timing and cyclical markets

Dr Ariel Sergio Goekmen (Switzerland)
Director
Credit Suisse Head Office

14:45 The Private Trusts Companies & family offices

- What is a private trust company?
- Uses of private trust companies
- Interaction of the private trust company with the family office

Mrs Justine Markovitz (Switzerland)
Principal
Withers LLP

15:30 Coffee break

15:45 Legal issues arising for trustees as a result of investment losses

- What are dangers to trustees from extreme market volatility
- Critical importance of due diligence
- Implications of Lehman/Madoff disasters
- Potential exposure of introducers, custodians, auditors, regulators...

Mr Paul Stibbard (United Kingdom)
Partner
Baker & McKenzie LLP

16:30 Poor global control? Consolidation & reporting challenges

- Maintaining global asset visibility
- Flexible portfolio consolidation
- Performance calculation
- Family's expectations

Chaired by:

Dr Steen Ehler (Switzerland)
Managing Director
Ferguson Partners Family Office

Accompanied with:

Mr Mark Lynam (United Kingdom)
Managing Director
ICF Management Ltd

Mr Sinan Oz (Switzerland)
Co-Founder
M.I.F SA.

17:15 Renewable Energy or the best way to mix capital preservation and strong returns

Mr Jean Carl Cohen (Switzerland)
Founder
Shagya Capital

17:30 Cocktail

DAY TWO 23rd April 2009

09:00 Chairman's welcome & opening remarks

Dr Steen Ehler (Switzerland)
Managing Director
Ferguson Partners Family Office

09:10 Family independence and coalitions

- Investing emerging markets
- Direct investments or through funds
- Middle-East, Africa and Asia
- Asset classes and products

Mr Constantin Salameh (United Arab Emirates)
Chief Operating Officer
Emirates International Investment Company

09:55 Strategies for operating in a downturn- update, threats and opportunities

- Managing money in a recession and previous/current experiences. What history has shown.
- Family offices searching for new ways to grow their businesses, the optimist and pessimist.
- Responses of investors and fund managers to the current environment.
- Potential threats and opportunities.
- Best practice risk management for investors and managers
- Obtaining diversification in the current environment. The failure of cash to generate a return.

Chaired by:

Ms Rosalyn Breedy (United Kingdom)
Founding Partner
Breedy Henderson LLP

Accompanied with:

Mr Francis Akpata (United Kingdom)
Director
Plymouth Capital

Mr Fred Fruitman (United States)
Managing Partner,
Loeb Partners

Mr Michiel van der Klooster (The Netherlands / United Kingdom)
Managing Director,
Klooster Capital Holding NV

10:40 Coffee Break

11:00 Custody and administration

- Combined reporting for family offices
- Transparency
- Outsourcing and outsourcing to external service providers
- Onshore and offshore services

Mr Pierre Condamine-Gerbier (Switzerland)
Managing Partner
Reyl Private Office

11:45 Families dealing with change

- Communicating properly between one generation and another
- Working effectively with legal advisors and investment advisors
- Dealing with conflict

Ms Barbara Hauser (Switzerland)



12:30 Lunch

14:00 The Importance of family governance

- Creating a Family Office Structure to include family governance
- Family Purpose
- Procedure and governance
- Private trustee companies implementing the family governance through the wealth structure.

Mr Stephen Pallister (United Kingdom)
Partner
Charles Russell LLP

**14:45 Family Offices and good banks:
optimizing clients values**

Count Albrecht Matuschka (Germany)
Managing Director
Matuschka Gruppe

15:30 Close of the conference

Thanks to our partners



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