



# Family Office Wealth Preservation Today

December 10, 2008  
Geneva - Switzerland

Conference Chairman

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



## Speakers

**Mr Pierre Rodocanachi** (France)  
Managing Partner;  
**Management Patrimonial Conseil**

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

**Mr Michael Maslinski** (United Kingdom)  
**Maslinski & Co Ltd**

**Mr Brent Rendall** (United Kingdom)  
Managing Director  
**Financial Objects**

**Mr Charles Hamilton Stubber** (United Kingdom)  
Director;  
**Aon Private Risk Management Europe**

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

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

**Mr Ian Ledzion** (Switzerland)  
**Axidia**

**Mr Andrew Nolan** (Switzerland)  
Head of Private Clients;  
**Stonehage Group**

## Programme

### 09:00 Welcome speech and introduction

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

### 09:10 Defining the precise role of your Family Office

- Wealth management
- Business management
- Family Management
- Administration

**Mr Michael Maslinski** (United Kingdom)  
Maslinski & Co Ltd

### 09:55 What Private /Family Office alternatives do wealthy families have?

- What are the needs of wealthy families and UHNWIs
- Which services are provided, by whom
- How much can be outsourced or insourced
- Trust and conflicts of interest
- Confidentiality vs sharing of experience?
- Selecting the right private office type
- Important issues and differences

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

### 10:40 Coffee break

## Event sponsor

**TORBAY TOUMA**  
BARRISTERS & SOLICITORS  
**AL-JARBOU LLP**

## Event partners



**11:00 Panel on IT and reporting systems for Family Offices**

**Chaired by:**

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

**Accompanied with:**

**Mr Brent Rendall** (United Kingdom)  
Managing Director  
Financial Objects

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

**Mr Ian Ledzion** (Switzerland)  
Axidia

**12:30 Lunch**

**14:00 Family Office and Asset Managers : A special relationship**

- Meeting the diversity of wealthy families' needs
- Identifying the appropriate Asset Managers
- Building the relationship
- Evaluating the performance
- Transparency and Trust

**Mr Pierre Rodocanachi** (France)  
Managing Partner  
Management Patrimonial Conseil

**14:45 What is risk management in a holistic client relationship?**

- What can be guarded?
- Processes for risk profiling and analysis
- Is insurance the only answer?
- Future risks and future exposures for family offices and family assets

**Mr Charles Hamilton Stubber** (United Kingdom)  
Director

Aon Private Risk Management Europe

**Prior:** Head of office; J.H. Minet in Monaco

**15:30 Coffee Break**

**15:45 Learn how to align the interests of the family, the advisers and the office**

**Mr Pierre Condamin-Gerbier** (Switzerland)

Managing Partner  
Reyl Private Office

**16:30 The Role of the Trustee**

- Market image of the Trustee
- The Trustee as legal owner of the assets
- Breadth of true Trusteeship
- Trusteeship versus "wealth management"
- Choose your Trustee wisely

**Mr Andrew Nolan** (Switzerland)

Head of Private Clients  
Stonehage Group

**17:15 Close of the conference**

**Financial Events *International***

**Family Office & Wealth Preservation Today**

Critical knowledge helping you choose the right approach to your business



**December 10th 2008 -Warwick Hotel, Rue de Lausanne 14 - 1201 Geneva, Switzerland**

Standard registration rate: 850 Eur / 1330 USD / 675 GB£ / 1380 CHF

For 2 Associates **(750 EUR /person)** : 1500 Eur / 2345 USD / 1190 GB£ / 2430 CHF

For 3 Associates **(600 EUR /person)** : 1800 Eur / 2815 USD / 1430 GB£ / 2915 CHF

For 4 Associates **(500 EUR /person)** : 2000 Eur / 3130 USD / 1585 GB£ / 3240 CHF

Please register the following delegate for this conference:

Name : .....

Title : .....

Company : .....

Address : .....

City/State/Zip Code : .....

E-Mail : .....

Phone/Fax : .....

Place/Date/Signature : .....

Financial Events International · 150 Route de Ferney · Case postale 2100 · 1211 Geneva 2 · Switzerland

Tél: +41 22 310 92 50 · Fax: +41 22 545 77 45 · www.financial-events.ch

**Refund Policy:**

There will be no penalty for cancellations received before 30 days prior to the first day of the conference. The full amount will be refunded

No refund will be issued for cancellations received less than 29 days before the first day of the conference. In that case registrants will be provided with a one year valid conference ticket to be used for one of our forthcoming events

All cancellations must be sent in writing via fax: +4122 545 77 45 or e-mail at registration@financial-events.ch