Financial Events *International*

Family Office & Wealth Preservation

Diversification through alternative investment

1st & 2nd October 2008

Warwick Hotel ****

Geneva, Switzerland

Conference chairman

Ms Barbara Hauser

Director, Private Wealth Advisory

Stanford Group (Suisse) AG

With the collaboration of

Mr Francis Akpata

Former head of Investor relations and business development

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

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

Mrs Stella Mitchell-Voisin (Switzerland)
Founder and Client Services Director;
Close Summit Trust Company SA.

Ms Barbara Hauser (Switzerland)
Director Private Wealth Advisory;
Stanford Group (Suisse) AG

Dr. Dirk Soehnholz (Germany)
Managing Partner;
Feri Institutional Advisors GmbH

Mr Jack Schwager (United Kingdom)
Investment director; **Fortune Group**

Dr Ranjan Bhaduri (United States)
Managing Director - Head of Research;
AlphaMetrix LLC

Mr Maximilian Spiess (United Kingdom)
VP-European Business Development;
FX Concepts UK Ltd

Mr Malcolm Glaister (United Kingdom)
Head of Family Offices and UHNW Sales (Europe);
AIG Global Investment Corp. (Europe) Ltd.

Ms Caroline Garnham (United Kingdom)
Partner; **Lawrence Graham LLP**

Mr Francis Akpata (United Kingdom)
Former head of Investor relations and business development

Mr Hugues Salomé (Switzerland)
Director - Tax & Legal Services
PricewaterhouseCoopers SA

Mr Jean Golinelli (Switzerland)
Managing Director;
CB Richard Ellis - PI Performance

Mr Fred Fruitman (United States)
Managing Director; **Loeb Partners**

Ms Rosalyn Breedy (United Kingdom)
Of Counsel; **Withers LLP**

Mr Christian Mustad (Switzerland)
Associate; **Edgar Brandt Advisory SA**

Dr Salvatore Imperatore (United Kingdom)
Pareto Capital International

Mr Constantin Salameh (Switzerland)
Managing Director; **SAFINVEST SA**

Our partners

Family Office & Wealth Preservation Conference:
Diversification through alternative investment

Programme

DAY ONE 1st October 2008

09:00 Chairman's welcome & opening remarks

Ms Barbara Hauser (Switzerland)
Director Private Wealth Advisory; Stanford Group (Suisse) AG

09:10 Comparison between single and multi family Offices

- Evolution of SFOs and MFOs
- Pros and cons
- Differences/Similarities
- Hybrid and other forms
- Which model for whom, when: experiences

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

09:55 The Importance of Family Governance

- Creating a Family Office Structure to include Family Governance procedures
- Family Purpose
- Procedure
- Governance
- Private Trustee Company implementing the Family Governance through the wealth structure

Ms Caroline Garnham (United Kingdom)
Partner; Lawrence Graham LLP

10:40 Coffee

11:00 The Private Trusts Companies & Family Offices

- How PTC's work?
- What their uses are
- How the FO and PTC work together
- Who does what

Mrs Stella Mitchell-Voisin (Switzerland)
Founder and Client Services Director; Close Summit Trust Company SA.

11:45 Opening the door to outsiders

Panel Discussion

- Moving from the buy-side to sell side
- Distribution internal products
- Competing with institutional companies
- Remaining independent
- Legal implications
- Conducting business outside the domestic remit
- Dealing with other family offices

Chaired by:

Ms Rosalyn Breedy (United Kingdom)
Of Counsel; Withers LLP

Accompanied by:

Mr Francis Akpata (United Kingdom)
Former head of Investor relations and business development

Dr Salvatore Imperatore (United Kingdom)
Pareto Capital International

12:30 Lunch

14:00 Risks Management for the Wealthy Family

- More volatilly, less risk appetite, changed strategy?
- Falling assets prices"we are long term investors now"
- Risk factors to consider (behavioural finance and more)

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

14:45 Focus on the Next Generation:

- Including them in the family decision-making process
- Inspiring them to pursue a form of "happiness"
- Intertwining Individual Independence and Family Coalitions

Ms Barbara Hauser (Switzerland)
Director Private Wealth Advisory; Stanford Group (Suisse) AG

15:30 Coffee

15:45 Improved risk-adjusted performance by currency investing

- What you should know about currency as an asset class
- Optimal investment structures for family offices
- Outlook for currency markets for the rest of the year and into 2009

Mr Maximilian Spiess (United Kingdom)
VP-European Business Development; FX Concepts UK

16:30 Operational benchmarking initiative for Family Offices

- Scope and objectives of the initiative
- Project methodology
- Family Office Leadership Model
- Selected Best Practices with Family Offices
- Key learnings from the initiative

Mr Constantin Salameh (Switzerland)
Managing Director, SAFINVEST SA

17:15 Cocktail

TORBEY TOUMA BARRISTERS & SOLICITORS AL-JARBOU LLP

DAY TWO 2nd October 2008

09:00 Chairman's Introduction

Ms Barbara Hauser (Switzerland)
Director Private Wealth Advisory; Stanford Group (Suisse) AG

09:10 Liquid Hedge Funds

- Liquidity Matters
  - The Value of Liquidity
  - Portfolio Management & Liquidity
  - Risk Management & Liquidity
- A type of Liquid Hedge Fund: Short-term/High Frequency Trading
  - Uncorrelated, high-frequency trading
  - Benefits for Portfolio

Dr Ranjan Bhaduri (United States of America)
Managing Director - Head of Research;
AlphaMetrics LLC

09:55 Transparent Hedge fund Investing: The Managed Account Alternative for the Institutional Investor

- Hedge funds vs traditional investing
- Fear of hedge funds
- Lack of transparency
- Managed accounts as alternative investment structure
- Advantages of managed accounts
- Downside of managed accounts
- Using transparency

Mr Jack Schwager (United Kingdom)
Investment director; Fortune Group

10:40 Coffee

11:00 130/30,Hedge fund replication and other new topics: what is really behind all this?

- Clearly increasing demand for alternatives
- Increasing supply in structured products and listed Alternatives
- Limited quality supply in Alternatives
- Selection of offers becomes even more complicated than today
- Are relations with product providers becoming more important again?
- Which specific strategies are especially attractive: real estate opportunity funds, long-bias hedgefunds, microcap private equity, cleantech venture?

Dr. Dirk Soehnholz (Germany)
Managing Partner, Feri Institutional Advisors GmbH

11:45 The search for zero correlation - alternative risks

- 'Insurance Linked'Investing
- Optimal Hedge Fund of Hedge Funds

Mr Malcolm Glaister (United Kingdom)
Head of Family Offices and UHNW Sales (Europe);
AIG Global Investment Corp.(Europe) Ltd.

12:30 Lunch

14:00 Real estate : safe heaven or risky play ?

- Brief review of major real estate markets
- Will value keep falling ?
- Are they opportunities, where ?
- How far Real Estate can be an hedge in trouble times ?

Mr Jean Golinelli (Switzerland)
Managing Director
CB Richard Ellis - PI Performance

14:45 Is now the time to increase a family's allocation to private equity and hedge funds?

- The key features of the current investment environment as they relate to private equity and hedge funds
- Defining what families should want from private equity and hedge funds
- Determining whether these goals are achievable in the short, medium and long term

· Some lessons learned in investing through a family office

Mr Fred Fruitman (United States of America)
Managing Director
Loeb Partners

15:30 Coffee

15:45 Swiss tax environment for family offices

· What tax regimes are available for family offices establishing in Switzerland?

· Are tax incentives available for their employees?

· Taxation of offshore investment vehicles: forthcoming developments

Mr Hugues Salomé (Switzerland)
Director - Tax & Legal Services
PricewaterhouseCoopers SA

16:30 Managing direct investments in private companies: specificities and challenges

· The dual objectives pursued by (U)HNWIs when investing directly in private companies

· Why/how private companies are different

· The reasons for frequent disappointements

· Keys to meeting a diverse set of expectations

Mr Christian Mustad (Switzerland)
Associate
Edgar Brandt Advisory SA

17:15 Close of the conference

Financial Events *International*

Family Office & Wealth preservation:
Diversification through alternative investments

Hotel Warwick**** 14, Rue de Lausanne, 1201 Geneva - Switzerland

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