



Financial Events International  
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## **Family Wealth & Family Office Conference: Threats and Chances in 2010**

December 8<sup>th</sup> & 9<sup>th</sup> 2009

Geneva - Switzerland

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Today more than ever Families and their Family Offices globally are steering in turbulent seas.

With the financial services industry undergoing major changes and the world economy trying to recover from one of the worst recessions since decades, families and their investment advisors are challenged to understand the current market environment and specific crisis strategies, and adopt new ways to manage their wealth in order to stay competitive in the short-term and eventually financially survive in the long term.

This crisis leads governments around the globe to look for new untapped sources of taxable funds. This means that suddenly the privacy of bank clients is under threat as Germany, France, the UK at the forefront of the G-20 and the OECD are undermining the walls of banking secrecy in so called tax heavens around the world.

What's more threatening to family offices is that their founders and families are scrutinizing the costs of family offices and officers, looking sternly at concretely added value of their own set-up vis-à-vis multi-family offices and bank family offices. The decay of assets puts the mere existence of single family offices at risk.

This invitation - only annual event will provide an abundance of practical information from an innovative blend of educational sessions featuring speakers discussing solutions to the diverse range of issues facing family offices today.

**A selection of top financial and industry experts will demonstrate to families how to make the most of their wealth in a world of regulatory and economic change. Main topics covered are:**

- Single family offices – gone with the winds of change?
- Succession Planning in times of threatened privacy
- Bank client secrecy – fundamentals – impending changes – outlook: impact on families in a world of shattered banking secrecy in tax heavens.
- Failure of the Modern Portfolio Theory and revisiting current thinking, new theories, old theories
- How to rebuild multi-asset class portfolios after the economic storm and regulatory change
- Future of Swiss banking
- How to invest in the future bull market
- Where is value in the commercial real estate landscape? Can risks be mitigated?
- Impact of the national economic and fiscal stimulus plans, how to make most of them

**The conference will also focus on the most important everlasting Family Office key topics such as:**

- The areas in which families are most vulnerable to fraud and deception. Offering useful tips and hints on recognizing and deploying preventative measures to guard against becoming a victim.
- The benefits of adding gold to your investment portfolio and how to manage gold exposure
- Rediscovering fixed income and anchoring your portfolio
- Property and casualty coverage: common property and casualty coverage issues that are frequently overlooked or given insufficient attention and will discuss how they should be addressed.

By offering a variety of highly applicable topics, this conference uniquely appeals to a wide audience — from the member of the wealthy family and private banking client to the ultra-high-net-worth manager and the family office professional to professionals serving a broader private client audience.



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### Request information and/or Pre-register for the conference

please fax or e-mail this Application Form back to us, filled and signed

Fax: + 41 22 545 77 45; Tel: + 41 22 310 92 50; e-mail: [l.plumet@financial-events.ch](mailto:l.plumet@financial-events.ch)

- I would like to receive the programme
- I would like to sponsor the conference
- I would like to participate as a speaker on the following topic :

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- I would like to pre-register for the following event "Family Wealth & Family Office:" and benefit of one of the following special rates

Standard registration rate: 1825 Eur / 2540 USD / 1545 GB£ / 2750 CHF

For 2 Associates (1290 EUR /person) : 2580 Eur / 3590 USD / 2185 GB£ / 3890 CHF  
For 3 Associates (1075 EUR /person) : 3225 Eur / 4495 USD / 2735 GB£ / 4865 CHF  
For 4 Associates (860 EUR /person) : 3440 Eur / 4790 USD / 2915 GB£ / 5190 CHF

**Special fees available for FEI past conferences attendees**

Please send the detailed program and the invoice at the following address:

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⇒The fee for the conference includes refreshments, lunch, cocktail and a conference booklet.

First Name:.....
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