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

March 30 & 31, 2010

Geneva - Switzerland

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.