Financial Events *International*

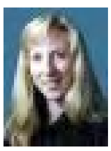
Family Office & Wealth Preservation Conference: Daily practice and new developments

24th & 25th September 2007
Mövenpick Hotel*****
Geneva, Switzerland

Outstanding panel of Family Offices Experts sharing with you their knowledge and insights

Jean Mandelbaum
President
Financial Events International

Mr Rupert Ticehurst
Partner
Herbert & Smith
United Kingdom



Mrs Justine Markovitz
Partner
Withers LLP
Switzerland

Mr Bernard Camblain (France)
Chairman;
Association Française du Family Office

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

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

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

Mr Etienne Eichenberger (Switzerland)
Co-founder; **Wise philanthropy advisors**

Mr Mike Vermeer (Netherlands)
Partner; **Novactum**

Mr Rupert Ticehurst (United Kingdom)
Partner; **Herbert & Smith**

Dr Nedim Peter Vogt (Switzerland)
Partner; **Bär & Karrer**

Dr Ramona Piscopo (Switzerland)
International Tax Lawyer; **Loyens & Loeff**

Mrs Justine Markovitz (Switzerland)
Principal; **Withers LLP**

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

Mrs Stella Mitchell-Voisin (Switzerland)
Founder and Client Services Director;
Close Trustees (Switzerland) SA

Mr Daniel Martineau (Switzerland)
Managing Director and Founder;
Close Trustees (Switzerland) SA

Mr Paolo Panico (Switzerland)
Managing Director; **Private Trustees S.A (Luxembourg & Geneva)**

Mr Joe Sovran (Switzerland)
Partner; **Capvent (Switzerland) SA**

Mrs Theresa Lloyd (United Kingdom)
Theresa Lloyd Associates

Ms Natasha Pearl (United States)
CEO and Founder; **Aston Pearl**

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

Family Office & Wealth Preservation Conference:
Daily practice and new developments

Programme

DAY ONE Monday 24th Sept 2007

09:00 Chairman's welcome & opening remarks

09:10 Who really needs a family office?
- Different FO & FOS Models: pros & cons
- Criteria for MFO or SFO
- What services to offer or outsource (lean/virtual vs. full-service FO)
- Independence & Conflicts of interest

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

09:55 The family office as risk manager for the family and the family members
- What family members should expect from their family office
- Long term vs short term
- The importance of risk management
- Identification of risks:
- Financial
- Legal and fiscal
- Linked to family governance
- Related to the family owned company
- How to classify and mitigate the risks

Mr Bernard Camblain (France)
Chairman; Association Française du Family Office
Vice president of the Supervisory Board; Meeschaert Family Office

10:40 Coffee

11:00 How to acquire proper new UHNWI clients?
- New clients: focus on social services
- Client loyalty; develop asset under management
- Think global, act local: international service program

Mr Mike Vermeer (Netherlands)
Partner; Novactum

11:45 Successful ways to grow the wealthy family's assets
- Pitfalls and trends
- Concepts and views
- Conclusion

Dr Ariel Sergio Goekmen (Switzerland)
Director; Credit Suisse Head Office
Vice-President of the British Swiss Chamber of Commerce

12:30 Lunch

13:30 The Four Seasons of sustainable wealth
(Breaking the three generation Cycle.)

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

14:00 The Risks of Disputes involving Trusts from a (Swiss) Civil Law Perspective
- Avoiding Trust Litigation from a (Swiss) Civil Law Perspective
- Prenuptial Agreements
- Divorce Law Issues effecting Trusts
- Divorce Law Issues effecting Trusts
- Matrimonial Property Law Issues
- Forced Heirship Issues
- Civil Law Rules against Perpetuities

Dr Nedim Peter Vogt (Switzerland)
Partner; Bär & Karrer

14:45 Developing a family strategy for philanthropy
- Current trends in giving
- Factors which make giving more likely
- The role of the professional adviser
- Timing
- The link between asset management and philanthropic interests
- Developing a family strategy for philanthropy - key steps

Mrs Theresa Lloyd (United Kingdom)
Theresa Lloyd Associates
Consultants to Charities and Arts Organisations

15:30 Coffee

15:45 Trustees and Protectors in the practice
- Reserved Power Trusts
- Specific Protector Legislation
- Protector's Powers: Personal or Fiduciary?
- A survey of case law on protectors

Mr Paolo Panico (Switzerland)
Managing Director; Private Trustees S.A (Luxembourg - Geneva)
Adjunct Professor; University of Modena, Italy
Member of the Society of Trust and Estate Practitioners

16:30 Managing philanthropy: moving from aspiration to commitment
- Tailor-made approach to help shaping a giving portfolio
- Case studies highlighting monitoring portfolio and learning for family governance
- Practical learning of collaborating between financial advisors and philanthropy advisors
- Does and don't in philanthropy engagement

Mr Etienne Eichenberger (Switzerland)
Co-founder; Wise philanthropy advisors

Prior: Consultant for the Schmidheiny Group's Avina Foundation
Senior Manager Centre for Strategic Insight,World Economic Forum

17:15 Cocktail

DAY TWO Tuesday 25th Sept 2007

09:00 Chairman's Introduction

09:10 Real estate investments: an asset issue or a class issue?

- How to approach real estate allocation
- Status of the investment vehicles universe
- Vehicles dedicated to HNW
- Global RE vehicles
- What means RE multimanagement

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

09:55 PTC's and Family Governance

- The challenges and the solutions
- Admin best practices
- How to accommodate family governance
- Advantages and disadvantages in using PTC's

Mrs Stella Mitchell-Voisin (Switzerland)
Founder and Client Services Director; Close Trustees (Switzerland) SA
Associate of the Chartered Institute of Bankers (ACIB)
Member of the Society of Trust and Estate Practitioners

Mr Daniel Martineau (Switzerland)
Managing Director and Founder; Close Trustees (Switzerland) SA
Member of the Trust Companies Institute in Canada
Chartered member of the Financial Planning Institute of Canada
Member of the Society of Estate and Trust Practitioners (STEP)

Prior: Managing Director; the Swiss trust company for a leading international private banking group

10:40 Coffee

11:00 Succession Planning - what could possibly go wrong?

- What is succession planning?
- What is not succession planning?
- What can go wrong with the devolution of wealth?
- Why do things go wrong?
- Case studies
- Planning to avoid disputes

Mr Rupert Ticehurst (United Kingdom)
Partner, Herbert & Smith
Member of the Association of Contentious Trusts and Probate Specialists

11:45 "Family Office" and A sset management: conflicting aspects?

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

12:30 Lunch

14:00 What are the interesting trends in India that we as a local private equity fund-of-funds investor have perceived?

- Role of private equity in India
- Changes seen in the market over the last few years in terms of number of players, maturity of the market, and competitiveness
- Changes seen in terms of number of players, maturity of the market, and competitiveness
- Where does the capital go in India?
- What have been the exit opportunities for private equity backed companies?
- What are return expectations? What are the risks?

Mr Joe Sovran (Switzerland)
Partner; Capvent (Switzerland) SA

14:45 Which is the most appropriate type of holding? Where to locate it?

Brief overview of wealth taxation in Malta
The new trusts-law in Malta
Malta as holding jurisdiction (with particular
. emphasis to shareholders residing outside the EU)
. Operating through a Swiss branch
. from a Malta company - tax implications

Dr Ramona Piscopo (Switzerland)
International Tax Lawyer; Loyens & Loeff

15:30 Coffee

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15:45 How the Single Family Office Handles Lifestyle Issues for the Family:

- How the Family Office can reduce risk and potential liability through its involvement
- Trends and best practices in private staff, medical care, art and travel
- Secrets to ensuring the Family's access to the best expertise

Ms Natasha Pearl (United States)
CEO and Founder; Aston Pearl

Prior: Senior Vice President and Worldwide Director of Relationship Marketing at Sotheby's
Principal,Mercer Management Consulting

16:30 Holding structures for family offices

- Structuring the family office legal entity
- Ownership of the family office
- Tax and regulatory issues
- Private ownership v trusts
- Interplay between family office and trustees
- Which model is best for your family?

Mrs Justine Markovitz (Switzerland)
Principal; Withers LLP

17:15 Closing Remarks

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Mövenpick Hotel ***** 20 route de Pré-Bois, Geneva, Switzerland

Please contact us for special hotel rates – e-mail: l.plumet@financial-events.ch

Registration fee: 2300 $ /1700 € /1155 $ /2750 CHF

A discount of 30% is granted to the second and any additional registration from the same institution

A 20% discount is granted to attendees from companies of conference speakers, from any office

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