Join us when 100+ Principals, Family Offices and CIOs meet!

HRH Princess Dr. Nisreen El-Hashemite

Dr. Auma Obama

Dr. Karl “Charly” Kleissner

Jay Elliot

Michael Beutler

Sharon Vosmek

Noor Sweid

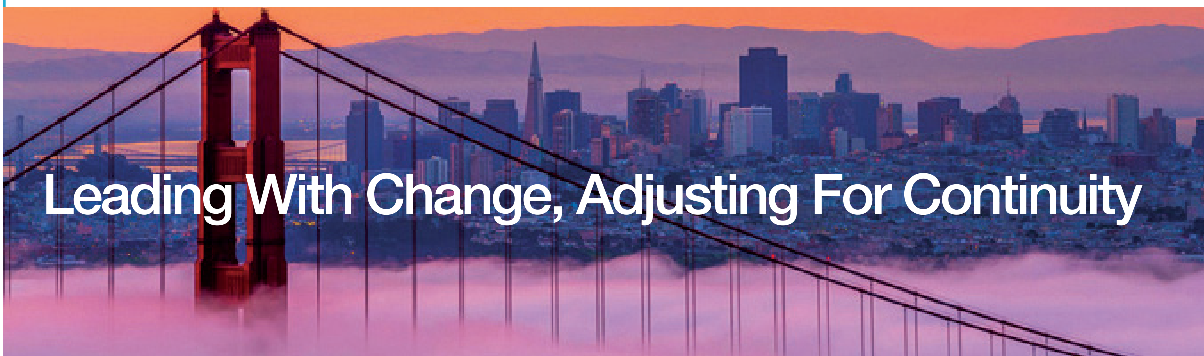
Hugo Peris

Dr. Maurizio Totta

Prestel & Partner

Family Office Forum

San Francisco, September 12-13th, 2018, Cabernet Sauvignon Yacht



This year has brought an unprecedented array of changes and opportunities to Family Offices and Wealth Owners.

The Prestel & Partner San Francisco Family Office Forum offers you first-hand insights into the various facets and benefits of purpose-led investing, and how innovation and solid structures can help attendees best define a sustainable family office and an investment strategy for generations to come.

Prestel & Partner Family Office Forums provide an exchange between family principals, family office C-suite executives, wealth owners, private investors, and select few partners with topical expertise on **best practice in family governance and investments.**

Join your peers and meet 100+ investors.

Free Entry for genuine* Family Offices

*Our definition of a Family Office is minimum $150m in assets and serving one or a few families (not a solution provider to many 3rd parties). Those doing both equally (being investor plus provider) are welcome to join us at a 50% fee.

Our Partners

Morgan Stanley

GUGGENHEIM

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The Ultimate Driving Machine®

Adjure Global

SEILER LLP CERTIFIED PUBLIC ACCOUNTANTS

Prestel & Partner

Family Office Forum

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Incredibly exciting to exchange views with other Family Offices on various investment options at such a high level...

Michael Prinz zu Salm-Salm

Prestel and Partner did a great job fostering collaboration around shared interest and respect.

Josh Cohen,
Single Family Office

By far the finest family office conference I have ever attended. Strongly recommended!

Ozi Amanat, CIO,
Single Family Office

Join our **San Francisco Family Office Forum** to receive guidance on the most salient family office topics via engaging and interactive panel discussions on best practices, inspiring presentations, insightful case studies with key learning points and always considerable time dedicated to Questions & Answers after each session. In addition, Family Offices and Private investors are invited to our investment round table discussions for in-depth conversations.

Thank you so much for two excellent days. What wonderful company, interesting topics and all in such excellent surroundings.

Edward Hoare,
Philanthropist

Let me please thank you for inviting me to participate in the Family Office Forum. It was exactly as you said it would be and I found it very stimulating and encouraging. Your reputation for finding influential 'can do' people who need to communicate with each other is certainly not exaggerated. It is indeed very important work that you do.

Viscount Chris Portman, Principal, Portman Estate

Thank you all for having me at this fantastic event. It was a great success for me because I met really interesting, committed and engaged people, who were able to share and give insight into ways to improve the work I am doing. The atmosphere was at once relaxed and serious, such that it enabled us to address the issues but at the same time enjoy each others' company. For me, a very successful event all round.

Dr Auma Obama

Prestel and Partner did a great job fostering collaboration around shared interest and respect – creating relationships in a short period of time, with people from different countries, backgrounds and perspectives.

Josh Cohen, SFO

The best Family Office conference I have attended. The quality of the speakers and topics was fantastic, the networking opportunity between all was really good as there were genuine FO's represented there and not just product salesmen. The venue and quality of the food was first class.

Richard Jaffee,
Single Family Office Principal

The San Francisco Family Office Forum, September 12-13th, 2018 is based on:

1. Extensive conversations with UHNWIs and months of research with Single and Multi Family Offices, private banks, banks with UHNWI management, academics and their partners.

2. The precise wishes and the active support of Family Offices. The agenda is based on the requirements and challenges of Family Offices in their day-to-day lives.

3. The long-standing expertise of the partners at Prestel & Partner, particularly with Family Offices. The genuine interests of Family Offices are at the core of our Forum. Please refer to our testimonials at **www.prestelandpartner.com**

The Family Office Forum takes a closer look. Topics are dealt with in depth to enable our participants to experience genuine progress in their work.

The Family Office Forum offers all participants a platform to exchange experiences, hear about the latest strategies and discuss them afterwards. It is the ideal environment to nurture important relationships and to meet new interesting contacts.

No product presentations or specific pitches - topics covered are key issues for Principals. These hands-on topics have clear advantages for all participants. The clear focus on added value, trends and strategies means that everyone stands to gain.

Are you a Principal or Family Office? We are delighted to welcome you and offer you privileged free admission! Simply contact: office@prestelandpartner.com

Are you a genuine partner of, or solution provider to Principals or Family Offices?
Simply contact: ticket@prestelandpartner.com

www.prestelandpartner.com

Prestel & Partner

Family Office Forum

San Francisco, September 12-13th, 2018, Cabernet Sauvignon Yacht

Your advantage

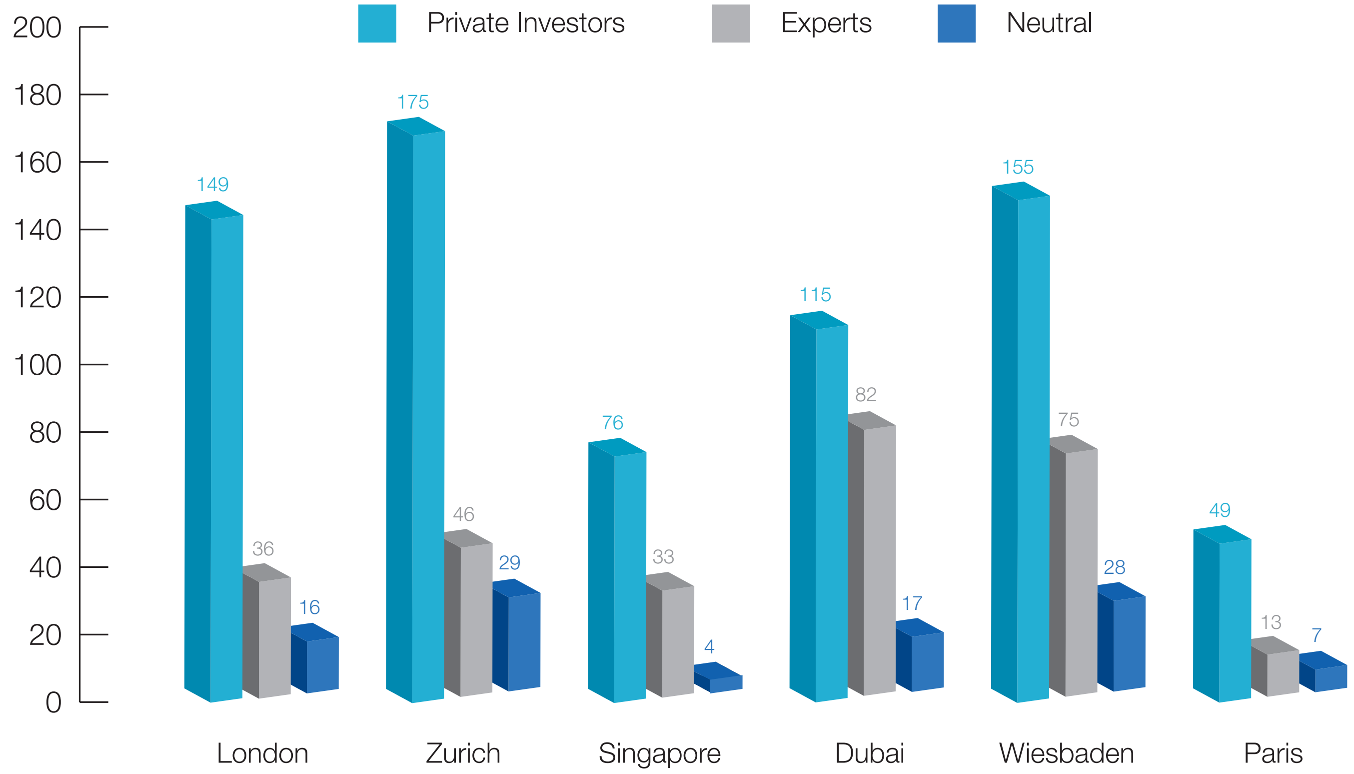
The audience: Our event is is exclusively dedicated for Single Family Offices, Principals and Private Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or solutions to third parties are considered to be solution providers.

The concept: More Family Officers than solution providers on stage and in the audience. Network with 100+ North America-based Family Offices.

The content: Bespoke and curated program with considerable time dedicated to in-depth discussions, knowledge and experience sharing and learning opportunities, and Q&As.

The Prestel & Partner Audience

A majority of Single and small Multi-Family Offices with the profiles of Principal, CEO, CIO, CFO, & COO.



Service providers are from various fields such as health, travel, international structuring, software, education or luxury goods – not uniquely from the financial industry. Partners contribute with and offer their expertise, without any upfront product sales.

www.prestelandpartner.com

Plenary Room: Presentations and panel discussions

Top Deck: All-day networking with refreshments

Roundtable Room: Investment roundtables - see pages 8-9

Day One - September 12th, 2018: Profit with Purpose

8:30 am Registration and Coffee

9:00 am Welcome and Introductions from Prestel & Partner

Best Practice In Conscious Investing: Profit With Purpose

9:10 am **Opening Keynote: Conservationist At Heart, A Tale Of Passion & Wildlife**
- A journey to make a difference
- Climate change as a core challenge to save our planet

9:45 am **Profitability Without Harming Our Planet: Learn From The Kering Story (Gucci & Co.)**
- How impact investing changes from something exotic, to standard
- Metrics in sustainability within a business and its operations and supply chain
- Sourcing luxury goods and its challenges in the face of climate change
- How private equity and conscious investing can stop climate change

Michael Beutler, Sustainable Operations Director, **Kering**

10:15 am **The Perfect Match: Profit And Positive Impact**
- Challenging the status quo of the financial system
- Measuring impact
- Impact investing to make a difference

Dr. Charly Kleissner, Co-Founder, **Toniic**
Fiona Bannister, Investor, Catalyst
Catherine Shiang, Next-Gen Member, **ACA Ltd.**
Moderator: Lily Trager, Director of Impact Investing, **Morgan Stanley**

11:00 am Morning Networking with Coffee and Refreshments

Focus On Sustainability

11:30 am **Sustainability Lens On Tech Investments**
- The new paradigm of tech investments
- Technology for family principals – a roadmap to success
- Sustainability at its core – implementing market ready solutions

Carl Page, Investor
Reema Khan, Entrepreneur
Scott Amyx, Futurist
Moderator: Matthew C. Le Merle, Managing Partner, **Fifth Era/Keiretsu Capital**

12:15 pm **A Mission To Provide Universal Access To All Knowledge - Hear From The Founder Of Alexa**
- Building the world's knowledge in digital format
- How deep Web geology can save humanity

Brewster Kahle, Inventor, Philanthropist, and Digital Librarian tbc

12:45 pm Lunch and Networking

6:15 pm - 8:45 pm
Networking Cocktail Reception

All attendees are warmly invited for a 2.5-hour networking cocktail cruise aboard the Cabernet Sauvignon Yacht around San Francisco Bay
Boarding is scheduled for 6.00 with a sharp 6.15 pm departure – don't miss the boat

Conference Program Day 1
Family Office Forum
San Francisco, September 12-13th, 2018, Cabernet Sauvignon Yacht
Prestel & Partner

Plenary Room: Presentations and panel discussions
Top Deck: All-day networking with refreshments
Roundtable Room: Investment roundtables - see pages 8-9
Day One - September 12th, 2018: Profit with Purpose

Philanthropy As Risk Capital: Applying Leadership And Innovation

1:45 pm **Insights Into Different Philanthropic Models**
- How to select something meaningful, and to what extent should families follow their head or their heart in choosing projects to fund?
- Main factors in creating a successful outcome in the charity sector, e.g., engagement and rigor
- Maximizing the impact of a philanthropic investment
- Philanthropy as governance tool – alignment, family engagement and purpose for the next-generation
- Development aid 2.0 – Limits of NGOs vs private sector success (field examples from Ethiopia and Zataari refugee camps)

Dr. Auma Obama, Founder and Director, **Sauti Kuu Foundation** tbc
Daniel Emmrich, Next-Gen Member, **Wieselhuber Capital Partners**
Stasia Obremskey, Philanthropist
Moderator: Melanie Schnoll-Begun, Head of Philanthropy Management, **Morgan Stanley**

2:30 pm **Creating A Sustainable Culture Of Innovation**
- Why innovation requires inclusive teams
- Why investments with women in positions of leadership perform better
- Accessing a global network - find an ecosystem that values your contributions

Sharon Vosmek, CEO, **Astia**

2:45 pm **Innovation In The Veins: A 4th Gen's Perspective**
- Ensuring innovation for different generations

Hugo Peris, Next-Gen Member, **Laboratorios Salvat**

3:15 pm Afternoon Networking with Refreshments

Family Office Operations Beyond Theory: Real Life Examples

3:45 pm **Restoring Hope: Family Office Superpower - Investing Between Families**
- Best practice in co-investments: The non-sequitur "Direct Investment" in the Age of Conscience
- Family Offices as superhero investors building a more balanced ecosystem

Adam Rockefeller Growald, Trustee, **Rockefeller Family Fund**
Sharon Vosmek, CEO, **Astia**
Ida Beerhalter, Co-Head, **IOME**
Moderator: William Doll, Founder, **Syneidesis Group**

4:30 pm **Impact Investing in the Amazon: Profitably Protecting The Rain Forest**
- A story about passion, meaning, and the triple effect of:
- Protecting the forest
- Creating employment, and
- Producing above-average financial returns

Dr. Maurizio Totta, Family Office Investor, Entrepreneur

4:45 pm **Real Assets: Energy As An Example – How to Combine Profit With Purpose**
- The era of renewable supermajors
- Economic, psychological, and geopolitical impacts

Steven Chu, Expert, former **United States Secretary of Energy** tbc
Alfred Watkins, Chairman, **Global Solutions Summit**

5:00 pm **Planning for Family Safety in Any Situation**
- While we don't always know when disaster will strike, we can control how we prepare and respond and recover from them
- Identify the hazards your family faces
- Understand what assets are at risk
- Measure how those hazards may impact your family and its well-being

Kate Norris, VP, Family Office Practice Leader, **Chubb**

5:30 pm **Pirates not the Navy! Disruptive Innovation**
- The Renegade Culture that Awakened Apple and Silicon Valley
- If Steve Jobs managed your company

Jay Elliot, Former Senior Vice President Operations, **Apple**

6:15 pm **Networking Cocktail Reception** - see the left page for more information

Family Office Forum

San Francisco, September 12-13th, 2018, Cabernet Sauvignon Yacht

Plenary Room: Presentations and panel discussions

Top Deck: All-day networking with refreshments

Roundtable Room: Investment roundtables - see pages 8-9

Day Two - September 13th, 2018: Best Practice in Governance and Operations

8:30 am **Welcome and Networking Coffee**

Governance and Operations Insights

9:00 am **Keynote – US Family Businesses: Difference In Performance vs S&P And European Family Businesses, And What You Can Learn From It**
- What differentiates the way US family businesses are run and managed vs the European ones
- How do they compare to public companies where there is not a family in control of the companies
- What lessons can we learn?

Stefano Natella, Head of Research, **Guggenheim Partners Securities**

9:30 am **Should Families Own The Holding Company Direct Or Through A Trust Or Foundation?**
- Reasons for and against direct ownership
- Areas to consider before deciding on a structure
- How will future generations react to the structure?

Paul Pybus, Managing Director, **Adjure Global**

Governance: How Other Families Handle The Fundamentals

10:00 am **Family Governance: A Foundation To Build Legacy For Generations To Come**
- Achieving sound family structures - the practicalities
- Creating alignment within the family (assemblies, charter, etc.)
- Family operated vs. external advice and management
- How to best prepare your children

Lisa Johnson, President, **Private Single Family Office** and **Family Foundation**
Ron LaVelle, Head Of Family Office Practice, **Seiler**

11:00 am **Morning Networking with Coffee and Refreshments**

Eye On Successions And Transitions

11:30am **Keynote: Best Practices For A Smooth Succession**

12:00 pm **Leadership Transition**
- Selecting the next leader from your talent pool or from outside
- Preparation and communication considering all scenarios and mitigating risks
- Expectations from and of the next generation of leaders

Kate Roberts, Co-Founder, **Maverick Collective, PSI**

12:30 pm **Lunch and Networking**

Conference Program Day 2

Family Office Forum

San Francisco, September 12-13th, 2018, Cabernet Sauvignon Yacht

Prestel & Partner

Plenary Room: Presentations and panel discussions

Top Deck: All-day networking with refreshments

Roundtable Room: Investment roundtables - see pages 8-9

Day Two - September 13th, 2018: Best Practice in Governance and Operations

Inside Perspectives: The Genius Of Nurture

1:45 pm **Inspiring Via Coding**
The benefits of learning to code at a young age
Hadi Partovi, Tech Entrepreneur, Investor, CEO, **Code.org**

2:00 pm **STEAM Education – Investing In Science, Art & Innovation For Sustainable Development**
- Bringing **Science, Technology, Engineering,** the **Arts**, and **Mathematics** as access points to foster dialogue and critical thinking from a young age
- Science, art, technology and diplomacy
- Why invest in science and art for sustainable development of your business?
- Our relationship with money – the non-fiscal challenges of money and wealth, focus on the next generation

HRH Princess Nisreen El-Hashemite, PhD, Executive Director, **Royal Academy of Science International Trust**
Hadi Partovi, Tech Entrepreneur, Investor, CEO, **Code.org**
Jess Jacobs, Next-Gen Member, Jacobs Family
Ronit Meshie Mai Lami PhD, Individual and Family Wealth Psychology Across Generations
Moderator: Chad Bolick, Executive Director, **Morgan Stanley**

2:45 pm **Personal Journeys: Bursting Bubbles or From Entitlement to Mindfulness**
- Redefining how we measure family wealth

Vincent Valeri, Managing Director, **Vedaera**

3:15 pm **Afternoon Networking with Coffee and Refreshments**

3:45 pm **The Wonders Of The Emotional Side Of Money And Wealth**
- Individuals within families becoming contributing leaders
- Operating in a safe space with each other
- Developing a model which holds the individual, the relationships with each other
- Setting guiding principles by the family for the family

Francesco Lombardo, Managing Director, **Veritage**

4:15 pm **Family Office Forum Summary and Closing Remarks from Prestel & Partner**

Special Feature For Private Peer-To-Peer Discussions

4:20 pm - 6:00 pm **Informal Roundtables: Two Parallel Sessions For Private In-Depth Conversations**

We will be running two separate roundtable sessions with a dedicated moderator belonging to the related peer group. The discussions will allow you to exchange views, opinions, and best practice, with an added benefit of fostering further bonds with your peers.

1. Roundtable exclusively designed for wealth owners (principals, other family members, private investors, UHNWIs)
2. Roundtable exclusively designed for non-family office executives, advisors, practitioners

Day One - September 12th, 2018

Investment Roundtables

An exchange of opinions, views and experiences made. Hear from experts and learn from peers.

These roundtables are held parallel to the plenary room's various insightful sessions and will allow attendees to join in-depth discussions around specific investment-related topics.

9:45 am Global Asset Management And Investment – Macro Views
- Insights from managing 242 billion US$ in total assets across fixed income, equity, and alternative strategies
- An open discussion on experiences made, lessons learnt and opinions

Moderator:
Byron Scott Minerd, CPA, Chairman of Investments, Global Chief Investment Officer,
Guggenheim Partners Investment Management LLC

11:00 am Morning Networking with Coffee and Refreshments

11:30 am Family Office Portfolio Construction
- Adjusting structures, balance, and alignment
- Increasing the pace, cushioning volatility - direct investing in focus

Moderators:
Brandon Rath, CIO, **Single Family Office**
Courtney Clark, Founder, **Aspen Peak Advisors**

12:45 pm Lunch and Networking

1:45 pm The Changing Insurance Needs of Millennials

Our youngest family members are facing greater risks than those of older generations. These youngest family members are quite often not adequately protecting their present and future wealth from mitigable risks. In fact, the 36 percent of young professionals who are living in the family home may also be exposing their successful parents to such risks.
Factors increasing risks are: Travel, Technology Usage, Sharing Economy

Moderator:
Kate Norris, VP, Family Office Practice Leader, **Chubb**

3:15 pm Afternoon Networking with Refreshments

3:45 pm The Crypto World For Family Offices - Fulfilling Or Failing Transformative Promises
- Explore various crypto opportunities
- Blockchain: sustainability and security
- Crypto currencies: value and tangibility

Chris Larsen, Co-Founder, Executive Chairman, **Ripple**
Doug Galen, Co-Founder, CEO, **Ripple Works**

4:45 pm VC In Emerging Markets – Hear From Entrepreneur-Turned-Investor
- What opportunities can the Middle Eastern and African record-high digital penetration rates and its burgeoning young population to the global tech community?
- Explore the investment access, processes, and the role of VCs

Noor Sweid, General Partner, **Global Ventures**

Day Two - September 13th, 2018:

Investment Roundtables

An exchange of opinions, views and experiences made. Hear from experts and learn from peers.

These roundtables are held parallel to the plenary room's various insightful sessions and will allow attendees to join in-depth discussions around specific investment-related topics.

10:00 am Impact Investing Roundtable I: Using Tools From The Financial Markets
- Explore how to get started to go deep into impact
- Learn about direct impact deals and impact portfolio construction
- Best practices, tangible solutions in the impact world

Moderator:
Dr. Charly Kleissner, Co-Founder, **Toniic**

11:00 am Morning Networking with Coffee and Refreshments

12:30 pm Lunch and Networking

2:00 pm Impact Investing Roundtable II: Going Direct

A discussion on how to achieve both profit and positive impact through direct investments

Moderator:
Dr. Maurizio Totta, Family Office Investor, Entrepreneur

Further roundtable topics may include: risk management, due diligence, valuation, biotech, longevity, costs, AI for family offices, etc.

Family Office Forum

San Francisco, September 12-13th, 2018, Cabernet Sauvignon Yacht

Background of Participants

More Family Offices on stage than service providers. More Family Offices in the audience than service providers. For further information on the composition of our audience please see: **www.prestelandpartner.com**

The high quality and relevance of our delegates is ensured because of
1. Our in-depth research and individual contacts
2. The personal and individual invitations to the Family Office Forum

Free participation is exclusive to Family Offices. Only genuinely relevant partners of Family Offices will be able to purchase a delegate pass. In addition the number of delegate passes is strictly limited. This ensures that the participating Family Offices enjoy a meeting among peers.

*Our definition of a Family Office; minimum $150m in assets and serves one or a few families (not a solution provider to 3rd parties). Those doing both (family investor and solution provider to FOs) are welcome to join us at 50% of the standard fee.

Who is a Partner

Partners are industry leaders in their respective fields and work with or for Single and Multi Family Offices. The Family Office Forum is not a sales show: partners do not present financial products but assist Family Office with optimization.
If you want to become a sponsor please contact office@prestelandpartner.com

Our Partners

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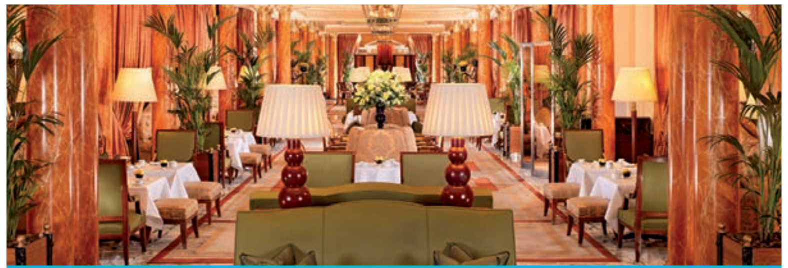


London, October 2-3rd, 2018

100+ UK-based Family Offices and UHNWI are expected - as per our unique definition below.

Zurich, November 13-14th, 2018

160+ International Family Offices and UHNWI from all over the globe are expected to join in November.

Dubai, February 5-6th, 2019

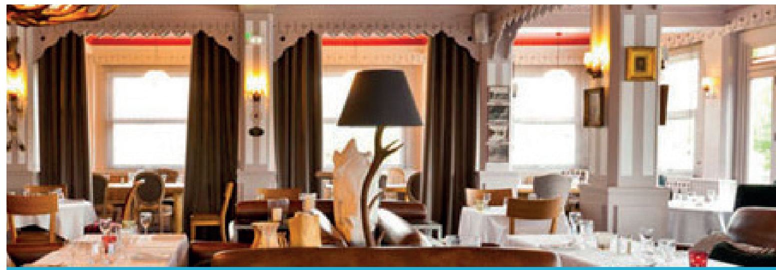
The MENA Family Office Forum for 100+ Principals and genuine *Family Offices with a clear minority of service providers.

Singapore, March 5-6th, 2019

100+ Asia-based Family Offices and UHNWI are expected, as per our unique definition below.

Wiesbaden, April 9-10th, 2019

Join us when 160+ genuine* German speaking Family Offices meet.



Paris, May 14-15th, 2019

Meet 100+ Francophone Family Offices and UHNWI.

Family Offices and UHNWI's enjoy free entry!

*Our definition of a Family Office is a minimum of $150m in assets from only one or few families / wealth owners, and the Family Office is working for these families (not as a solution provider to many 3rd parties).
Please contact office@prestelandpartner

Do you work with Family Offices? The Family Office Forum is not a sales show and places for service providers are strictly limited! To register please visit www.prestelandpartner.com

Your Registration:

Online at: www.prestelandpartner.com under tab "Become a Delegate" or send an email to: office@prestelandpartner.com
By phone: Please dial +44(0) 20 339 71390

Family Office Forum

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Prestel & artner

Reserve your place at the Family Office Forum San Francisco

September 12-13th, 2018, Cabernet Sauvignon Yacht

Register Now

Free Admission for Family Offices

Are you a wealth owner, family principal or a C-suite executive of a genuine* Family Office?
You have the privilege of free admission. Please contact tobias.prestel@prestelandpartner.com

For commercial multi-family offices, advisors we offer a limited amount of tickets, please book yours: ticket@prestelandpartner.com

For any sponsorship opportunities, please contact: office@prestelandpartner.com

	Until August 10th, 2018	From August 13th, 2018	Number
Both Days: September 12th and 13th, 2018	$3090 + VAT Save $400	$3490 + VAT	
One Day Only: September 12th or 13th, 2018	$2590 + VAT Save $400	$2990 + VAT	
		Total	

Registration fee includes refreshments, coffee breaks, snacks, buffet lunch, drinks and conference documentation. Accommodation and travel is not included. VAT subject to government change.

Your contact details

Delegate name: ______

Title: ______

Company: ______

Address: ______

Country: ______

Telephone: ______

Email: ______

Permission granted by (name and signature): ______

How to register

In writing: Post us this form, or fax it to +44 (0) 20 3397139 1

Online: www.prestelandpartner.com in the section "Become a Delegate" or email office@prestelandpartner.com

By phone: +44 (0) 20 339 7139 0

Payment Details

Bank transfer: Prestel and Partner Ltd
Account: 46223368, Sort code 30-99-93,
BIC LOYD GB21132,
IBAN GB43 LOYD 3099 9346 2233 68,
Lloyds TSB Bank

Payments due within 10 days of invoice date, and in advance of the Family Office Forum. For terms and conditions see www.prestelandpartner.com

Privacy

☐ Tick here if you do not wish to receive information from Prestel and Partner Ltd.

Cancellation policy

1. If you are unable to attend your place is transferable.
2. Invoiced amounts are due in full. Prestel and Partner will not issue refunds.
3. If you register but can not attend Prestel and Partner will provide you with conference documentation.
4. Prestel and Partner reserves the right to amend the conference program and schedule without notice.
5. Prestel and Partner is not responsible for any costs occurring due to any changes or cancellations.

* P&P definition of a Family Office; minimum $150m in assets and serves one or a few families (not a solution provider to 3rd parties). Those doing both (family investor and solution provider to FOs) are welcome to join us at 50% of the standard fee.