

22 & 23 September 2009
Jumeirah Carlton Tower, London

HEDGE FUNDS
REVIEW

Family Office Leadership SUMMIT

Robust governance structures
and sound investment practices
to protect family wealth through
turbulent times

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An  **incisive media** event
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Dear Executive,

It is with great pleasure that I welcome you to our **3rd Annual Family Office Leadership Summit**.

Hosted by *Hedge Funds Review*, the summit has been specifically designed to address the most pressing challenges currently facing family offices, as well as showcasing the most innovative and successful investment strategies. It follows in the footsteps of our exclusive Investor Club Lunch series and the huge success of last year's event, and has been tailored to bring you select coverage of the latest and most debated topics in the family office arena today.

Once more we are extremely proud to announce an outstanding speaker line-up, with many of the UK and Europe's leading family offices sharing their thoughts and expertise on current issues. Full details of the agenda can be found overleaf.

Beyond the comprehensive programme of panel discussions and presentations, the summit also provides a unique and exclusive forum in which representatives from leading family offices can come together to share ideas on how best to meet the challenges facing their firms. We have attracted family office representatives from across Europe and encourage you to meet with as many of your peers as you can. We would also like to thank our sponsors for their support in the event and hope you have time to meet with them at one of the networking breaks.

If someone needs to contact you during the summit, they should call the Jumeirah Carlton Tower Hotel on +44 (0) 20 7235 1234 and ask for the Incisive Media Family Office Summit. Messages will be posted on the board at the registration desk. If you require assistance on the day, please contact:

Richard Doherty, Conference Production
Karolina Chmielarska, Conference Co-ordination
Ben Cronin, Sponsorship & Exhibition

I hope you enjoy the conference!

With best regards,

Richard Doherty
Conference Manager
Hedge Funds Review

To access the conference presentations please go to www.hedgefundsreview.com/familyoffice, click on "Presentations" and enter the following username and password:

Username: **fol**

Password: **4622/09**

Programme

Day 1 – Tuesday 22 September 2009

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08:30	Registration and refreshments
08:50	Chairman's opening remarks Ian Morley , Chief Executive Officer, CORAZON CAPITAL
09:00	Keynote address: Macroeconomic outlook for the UK and beyond John Redwood , Chairman, EVERCORE PAN-ASSET CAPITAL MANAGEMENT LIMITED
09:40	Chief Investment Officer Roundtable: Asset allocation strategies for a volatile investment environment Moderator: Jonathan Bell , Chief Investment Officer, STANHOPE CAPITAL Paul Kennedy , Chief Investment Officer, GWM GROUP Tushar Patel , Chief Investment Officer, DHANSA FAMILY OFFICE John Redwood , Chairman, EVERCORE PAN-ASSET CAPITAL MANAGEMENT LIMITED Dominic Gibbs , Director, THE CAYZER TRUST COMPANY LIMITED
10:40	Morning refreshments and networking break
11:00	12 minute presentations on the latest strategies and best performing products presented by leading alternative asset managers FAIRCROFT PROPERTIES , James Burchell , Chief Executive TFS STRUCTURED PRODUCTS , Nicolas Gaumont-Prat , Structured Products, Co-Head CHINA NEW ENTERPRISE MANAGEMENT , Johannes Schoeter , Founding Partner CAPITALSPRING LLC , Richard Fitzgerald , Managing Partner
12:00	Panel: Diversification – Friend or Foe? Moderator: Paul Kennedy , Chief Investment Officer, GWM GROUP Hela Dammak , Managing Director, Global Markets, SOCIETE GENERALE CORPORATE & INVESTMENT BANKING Jonathan Fry , Director & Founder, FRY FAMILY OFFICE Pierre Condamine-Gerbier , Director, REYL PRIVATE OFFICE
12:40	Building a well designed hedge fund allocation – one manager's perspective and experience Jeffery Geller , Managing Director, JPMORGAN ASSET MANAGEMENT
13:20	Lunch and an opportunity to visit the exhibition
14:20	12 minute presentations on the latest strategies and best performing products presented by leading alternative asset managers TTP VENTURES , David Gee , CEO DTAP CAPITAL ADVISORS , Hugh Warrender , Partner AGROTRUST , Matthew Gilpin , Co-CIO (Group CEO, EMAC Capital Ltd)
15:20	Offshore wealth preservation structures for family offices Caroline Garnham , Partner, LAWRENCE GRAHAM
15:50	Afternoon coffee and networking break
16:15	Global Credit: Past, present and what does the future hold? Scott Service , Senior Global Strategist, LOOMIS, SAYLES & CO
16:40	The growing importance of formal family governance Andrew Rodger , Executive Director, Head of Family Office Division, STONEHAGE
17:10	Panel: Creating the optimum family office structure Moderator: Steen Ehlern , Managing Director, FERGUSON PARTNERS FAMILY OFFICE Gero M. Bauknecht , President, BAUKNECHT CAPITAL Jonathan Fry , Director & Founder, FRY FAMILY OFFICE Pierre Condamine-Gerbier , Director, REYL PRIVATE OFFICE Andrew Rodger , Executive Director, Head of Family Office Division, STONEHAGE
17:50	Chairman's closing remarks
18:00	Cocktail reception

Programme

Day 2 – Wednesday 23 September 2009

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08:30	Registration and refreshments
08:55	Chairman's opening address
09:00	The Single Family Office Research Project - results from the cross-continental collaboration with the Wharton Global Family Alliance Heinrich von Liechtenstein , Professor, IESE Business School, UNIVERSITY OF NAVARRA, Barcelona
09:40	Seeking out investment opportunities for smaller family offices – The challenge for a small fish in a shoal of barracuda Duncan Straughen , Director, WATES FAMILY OFFICE
10:20	Morning coffee and networking break
10:40	European credit markets – the next bubble? Moderator: Ian Morley , Chief Executive Officer, CORAZON CAPITAL Simon Thorp , Head of Fixed Income, LIONTRUST James Sclater , Senior Portfolio Manager, Fixed Income Team, LIONTRUST Paul Owens , Co-Head of Research, Fixed Income Team, LIONTRUST
11:20	12 minute presentations on the latest strategies and best performing products presented by leading alternative asset managers LIONTRUST , Simon Thorp , Head of Fixed Income THE CUBA RECOVERY FUND , Alex Schmid , Managing Partner <i>introduced by DAR CAPITAL</i> , Justin Atkinson , Managing Director EPISTEME CAPITAL PARTNERS , Adrian Eterovic , Chief Investment Officer PRINCE STREET CAPITAL MANAGEMENT , Michelle Kelner , Managing Director
12:20	Effective risk management for family offices Roger Nightingale , Global Economist and Strategist, POINTON YORK SIPP SOLUTIONS
13:00	Lunch and an opportunity to visit the exhibition
14:00	The path to create a family office and develop it over time – a family case-study Gero M. Bauknecht , President, BAUKNECHT CAPITAL
14:40	Where now for commercial property? Andrew Jackson , Investment Director, STANDARD LIFE INVESTMENTS
15:05	Afternoon coffee and networking break
15:30	Family Offices – it's about more than money Jonathan Fry , Director & Founder, FRY FAMILY OFFICE
16:10	Panel: Should investment decisions be outsourced? Moderator: Steen Ehlern , Managing Director, FERGUSON PARTNERS FAMILY OFFICE William Drake , Co-Founder, LORD NORTH STREET CAPITAL Julien Sevaux , Managing Partner, STANHOPE CAPITAL
16:50	Chairman's closing remarks
17:00	End of Conference