

International Family Office Forum

Post-Event Report

The annual global meeting of UHNWI and Family Offices from around the globe
8 – 9 November 2016 (next Zurich event: 14 – 15 November 2017)

Introduction

The Family Office Forum Zurich in November 2016 hosted **115** UHNWI and Family Offices from all across the globe! The positive feedback was rewarding and we are grateful to have had such high-quality speakers and attendees.

In view of the overwhelming demand for our events, we are actively preparing Family Office Forums in 2017: [Dubai](#) February 2017, [Germany](#) May 2017, [London](#) October 2017, [International](#) Forum Zurich November 2017, [Singapore](#) December 2017.

Programme, Speakers and Audience

The Forum [programme](#) was based on recommendations and several months of research. However, it is thanks to our 54 [speakers](#) (who, like the audience, were predominantly UHNWI or Family Officers) that the Family Office Forum was such a success.

Partners (Sponsors)

The expertise of our 16 expert [partners](#) made the Family Office Forum possible. The partners reported being happy with the contacts made and results achieved during their participation.

Organisers' Summary

We would like to thank all the family officers, family members, experts and in particular the speakers who attended the International Family Office Forum in Zurich 2016 to exchange information, learn about new trends and options, hold discussions and last but not least, to network with peers.

We are looking forward to the Family Office Forums in 2017: Get in touch and secure your place: We very much look forward to welcoming you!

Yours,

[Katja Mülheim](#) and [Tobias Prestel](#)

Attendee Structure

The composition of participants was exceptional thanks to careful vetting, insider recommendations and a firm separation between buy side and sell side:

- 115 UHNWI and Family Offices attended the Family Office Forum
- The number of UHNWI and Family Offices was higher than the number of Solution Providers (Counted in people, 5:3 and counted in attending companies, a ratio of 2:1!)
- Excellent level of participants, who enjoyed the lively debates and networking opportunities

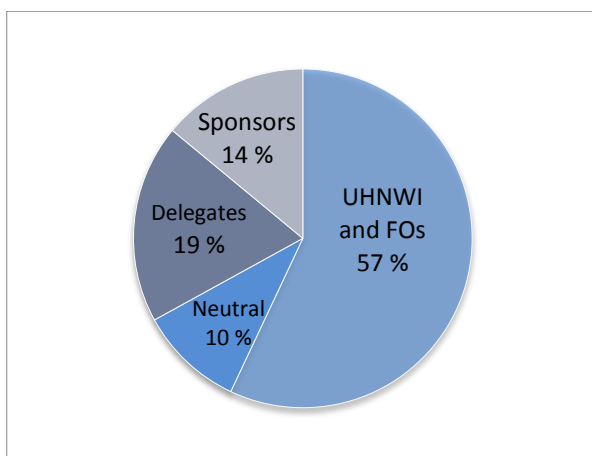
202 attendees in total

(Tuesday 170, Wednesday 130 attendees; average median number was 150 at any given time)

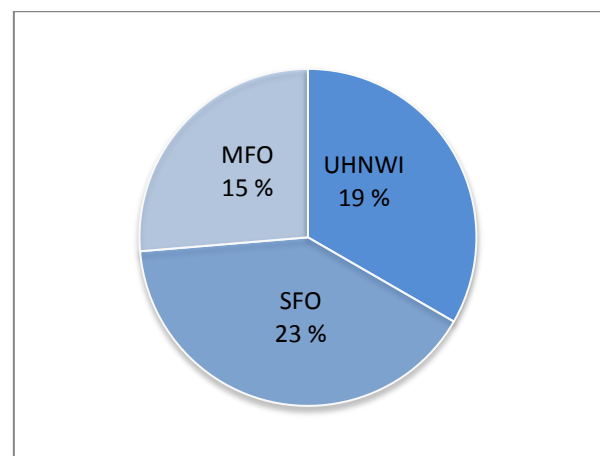
			Assets under Management
115 Family Officers und UHNWI	57 %		
✓ 38 UHNWI	19 %		> 35 bn *
✓ 47 Single Family Officers	23 %		> 60 bn *
✓ 30 Multi Family Officers	15 %		> <u>16 bn</u> *
			> 111 bn *
20 Neutrals	10 %		
✓ 8 Neutral Academics	4 %		
✓ 8 Neutral Experts	4 %		
✓ 4 Neutral Guest	2 %		
39 Delegates (34 companies)	19 %		> 28 bn *
27 Sponsor delegates	14 %		> 400 bn *
✓ 16 Sponsor companies	8 %		
✓ 12 Additional Sponsor Delegates	6 %		
Total		100 %	> 539 bn*

* Conservative estimate

Attendee Composition



Family Office Composition



Testimonials

Congratulations - very well organized, everything went smoothly and the organizers were discretely in the background in the most positive sense. The sessions were intriguing and provided interesting food for thought. But what I was most impressed with was the quality of the attendants. Only a very few service providers but plenty of Principals and investors of all sorts with a variety of international background I enjoyed the many conversations very much. So, in short, it were two days well invested - definitely an event I can recommend without hesitation! Once again, thank you,
András Gosztonyi

Hands down the best FO event ever! The Zurich conference was outstanding in a crowded field of family office events. The notable feature is multiple topic tracks with top notch speakers who are rare on the circuit. There were also many families in attendance, making the networking very worthwhile. Prestel and Partner is effective at vetting to ensure the right people are in the room. The venue, the Dolder Grand, was fantastic and conducive to having private chats as well as mingling. Excellent!

Steffi Claiden, Family Office Review

As a 20 year veteran of the wealth management business from the FO side of the aisle, I have actively participated in many a conference and would consider your Zurich program truly outstanding... top of what I have ever attended. The setting was spectacular, accommodations superb, food outstanding but most importantly the attendees – representing a global audience of families – were outgoing/candid/interesting and enjoyable to spend time with! Congrats on a terrific job...well done!

Stephen McCarthy, Family Investment Office

The laidback yet very professional ambiance appealed a lot to me, such as the ability to choose from a variety of very interesting presentations

Bruno Sidler, globalOne ag SFO

Thank you for the very warm hospitality and efficiency in which the Zurich conference was held. I was very impressed and really enjoyed the academic exchanges and the atmosphere for conference members to interact and get to know each other. I very much look forward to attending future Prestel & Partner Family Office Forums.

Sebastian Pech, BTV Group SFO

The FO Forum was excellent. Organization perfect and the audience, especially the large number of principals, was impressive. Thank you very much for inviting us and please keep us posted on your future events.

Heiner Weber, SFO

Great success! Very well organised. Tight schedule. Brilliant ambiance. Communicative participants. Interesting and rewarding exchange with both peers and well behaving solution providers. Looking forward to your next event!

Stephan Gerwert, Rigi Family Office

I am very grateful having been invited to Zürich. This was the second time I attended having only been in Wiesbaden before. The choice of topics, the expertise of the speakers and the networking was excellent. I went home with many new ideas and concepts and have had interesting new contacts which I will follow-up on. Kind regards

Michael Hamke, SFO

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

I enjoyed the Family Office Forum in Zurich more than other conferences for Family Offices. The atmosphere was very good, it was truly international and I had many interesting discussions with people from all over the world. Tobias Prestel and his team were again successful in broadening the subject matters of presentations and discussions – and Zurich was a nice place to be.

Klaus Demleitner, Compliance Consulting

Thank you for hosting a wonderful conference, it was a spectacular event!

Ozi Amanat, CIO of Spice Global, both Corporation and Family Office