

Family Office Forum London, 21 – 22 October 2014 (Next: 15 – 16 September 2015)

The annual meeting of UHNWI and Family Offices based in the UK

Post-Event Report

Introduction

The Family Office Forum London in October 2014 was originally planned for 80 UHNWI and Family Offices based in the UK – that number grew to an incredible **138** UHNWI and genuine Family Offices actually attending! The programme, the audience as well as the ambience in short, everything exceeded our expectations by far: See statements [here](#) .

Because of the overwhelmingly positive feedback we are now working on our Family Office Forum in 2015: [Germany](#), Wiesbaden May 2015, [London](#) September 2015 and [International](#) Zurich November 2015.

Programme, Speakers and Audience

The high level of interest in the Family Office Forum was based on its [programme](#), which in turn was based on several months of research. However, it is thanks to our 42 (!) [speakers](#) - who, like the audience, predominantly are UHNWI or Family Officers - that the Family Office Forum was such a resounding success.

Highlights included a Nobel Peace Prize Holder, a former head of state, a famous economist and overall the clear majority of UHNWI and Family Offices with AUM > 120 mio GBP.

Partner (Sponsors)

The support of our [partners](#) made the Family Office Forum possible.

Our partners were very happy with the results, as were all other attendees: See statements [here](#) .

The very key to this success was the highly relevant expertise of our carefully chosen partners!

Organisers' Summary

We would like to thank all the family officers, family members, experts and, in particular, the speakers who attended the Family Office Forum London 2014 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 Forum in 2015:

[Germany](#), Wiesbaden May 2015, [London](#) September 2015 and [International](#), Zurich November 2015.

Get in touch and secure your place: We very much look forward to welcoming you!

Yours,

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

Attendee Structure

Considering the attendee structure the Family Office Forum London was an extraordinary success:

1. **138 UHNWI and Family Offices** attended the Family Office Forum
2. **The number of UHNWI and Family Offices was significantly higher than the number of Solution Providers (counted in attending companies, a ratio of about 2:1 !)**
3. **Excellent level** of participants, who enjoyed the lively debates and networking opportunities

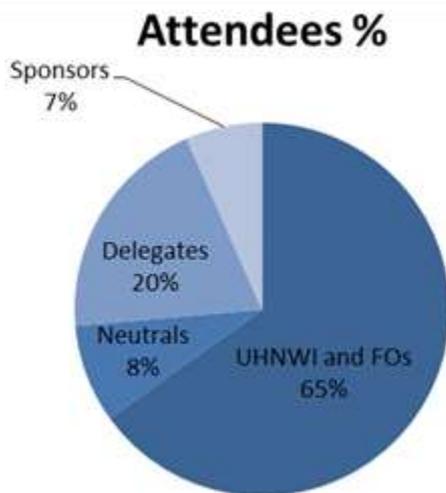
212 attendees in total

(Tuesday 168, Wednesday 201 attendees; average number was 150 at any given time)

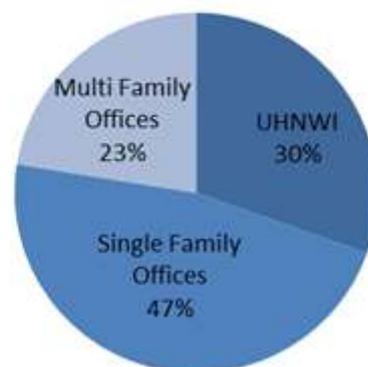
		<i>Assets under Management</i>
138 Family Officers und UHNWI	50 %	
✓ 42 UHNWI	15 %	> 35 bn *
✓ 65 Single Family Officers	23 %	> 60 bn *
✓ 31 Multi Family Officers	12 %	> <u>16 bn</u> *
		> 111 bn *
18 Neutrals	5 %	
✓ 02 Media Partners	1 %	
✓ 04 Neutral Academics	1 %	
✓ 04 Neutral Experts	1 %	
✓ 08 Neutral Guests	2 %	
42 Delegates (40 companies)	26 %	> 28 bn *
14 Sponsor delegates (28 companies)	19 %	> 400 bn *
✓ 09 Sponsor companies	8 %	
✓ 05 additional Sponsor Delegates	11 %	

<i>Total</i>	100 %	> 539 bn*

See Appendix: Conservative estimate



UHNWI and Family Offices



Testimonials

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. Again, thank you, it was a real pleasure to meet you and your wonderful team. With warmest regards,

Viscount Chris Portman, Principal, Portman Estate

Thank you so much, for allowing me to attend the family office conference. Found many of the talks very useful and thought provoking plus I met a number of dynamic and interesting people with whom I hope to stay in touch. I would be most interested in knowing of any future events you run. I am sure you've had good feedback as the event certainly deserves it. Kindest regards, **Fiona McKenzie, Principal**

A big thank you for the Conference last week. It was very interesting and good to catch-up with a number of familiar faces one normally doesn't see on events! Thank you also for the excellent event lunch at China Tang. Kind regards, **JJ Jardine-Paterson, Principal**

To be honest the feedback I received until now has been amazing. You are doing a great job, and I am truly impressed about the people you manage to bring together! **Carl von Bismarck, Principal**

Brilliant, informative and refreshingly different! Thank you, **Dominik von Eynern, Principal**

Thank you very much for inviting me to the family office in London. I appreciated very much these 2 days and I learned a lot from the speaker and attendees. I'm looking forward to your next event. Kind regards, **Katrin Leiber, Principal**

A massive thank you again for letting me be part of what was a smashing program with two excellent days spent in London: All throughout the conference I heard high praise from the attendees about the conference. My heartiest congratulation again for what was really a successful and memorable conference - truly you are the gold standard! Best regards **Aradhana Howala, Managing Partner, bridge.over Group S.A.**

Thank you very much for a most stimulating, interesting and high grade 2-day Family Office conference. From the speakers on various panels to the attendees, and excellent refreshment and food, it was the best Family Office conference I have thus far attended.

You gathered together a most authentic and dedicated group of Family Office principals and advisors. I very much admire your professional attention to detail and perfectionism on all levels.

With all good wishes and look forward to our working together in 2015, **Wendy Coumantaros, Publisher, Spear's**

I have been to numerous conferences over my career and the event last week definitely ranked at the top of the list. The speakers were very interesting and the networking opportunities incredibly helpful and productive. I spoke with many other first-time attendees and they felt similarly. Regards, **Eric Kolodner, Armacom**

I just wanted to thank you for The Forum. I really appreciated the conference and the high quality of the speakers. Best regards, **Jeremy Hassenforder, Managing Director, Single Family Office**

I wanted to congratulate you for the amazing event you organized in London. It was most interesting and most appreciated by all participants I could speak to. Very very well done! Thank you and see you soon, **Daniele Bartoccioni-Menconi, Managing Director, Merrill Lynch**

I just wanted to both congratulate and thank you for an excellent event this week. As someone who has worked both within a Family Office and on the provider side of the fence, I thought that the topics were a refreshing change from many conferences, and provided delegates with a lot of food for thought and challenge as to what they and their Family Offices could do and might want to consider doing. The organisation was superb and hassle free and I very much enjoyed meeting, speaking to and listening to many of the people who attended. **Peter Coulthard, Ernst & Young**

My thanks for the Forum. I found the content and speakers of great interest and marvelled at how the whole event ran on time. Regards **Stuart Thomson, Harrods Bank Ltd**

I could not be more impressed with the Family Office Forum in London you organised. It was amazing and beautifully delivered in every aspect. Warmest wishes, **Caroline Curtis Dolby, Ad.Dip. Psychotherapy, RCN, NCS, BACP.EFT.**

Thank you for including me. I much enjoyed the two days which from my perspective just got better and better and had a super opportunity to network. Best wishes **Rosemary Norris, Advisor SFO**

Thanks a lot and my congratulation for a perfect organization and quality contents: All the attendants have been very happy about the conference! Best, **Prof. Walter Zocchi, University Milano**

Appendix

Assets under Management (AUM) of the participants:

Buy Side > AUM 111 bn, Sell Side > AUM 428 bn (Total 539 bn).

We would love to be more specific as below, but as you certainly understand our guests would not appreciate this. Our strict confidentiality of information is an absolute precondition for the attendance of most Family Officers and UHNWI.

42 attending UHNWI – AUM > 25 bn

- The “Asset Top 5” of the attending UHNWI together have an average of AUM 8000 mio each
- The remaining UHNWI have a median of AUM 600 mio each

65 attending Single Family Offices – AUM > 60 bn

- The “Asset Top 10” of the attending SFOs together have > 60 bn, an average of > 4 bn AuM each
- The remaining SFOs have a median of AUM 500 Mio each

48 attending Multi Family Offices – AUM > 16 bn

- The “Asset Top 10” of the attending MFOs together have an average of > 3 bn AuM.each
- The remaining MFOs have a median of AUM 350 Mio each

Please note that asset managers or bank departments are not counted as MFOs. They are listed as delegates.

9 Partner (Sponsors) with AUM > 200 bn

- “With AuM”: Not included in this list are the assets of partners such as Sotheby’s.
- Only 2 of a total of 9 Partner (Sponsor) corporations are financial service institutions with AuM.

18 Delegates with AuM – AUM > 18 bn

- In addition to the partners (sponsors) above, a number of paying delegates attended:
- 18 of these delegates were management level financial solution providers with an average AuM of > 1 bn.

The AuM listed here relate to the decision makers present at the Family Office Forum.

Example: Deutsche Bank worldwide AuM > 700 bn, DB PWM worldwide AuM > 270 bn:

We do not use these figures for the purpose of this report, but apply instead the figures the attending managers are directly responsible for only:

The total of AuM stated is therefore a conservative estimate.