



# Family Office Forum Zurich

## Post-Event Report

The annual global meeting of UHNWI and Family Offices from around the globe  
14 – 15 November 2017 (next Zurich event: 13 -14 November 2018)

### Introduction

The Family Office Forum Zurich in November 2017 hosted **175** 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 these Family Office Forums in 2017/2018: [Singapore](#) 5-6<sup>th</sup> December 17, [Dubai](#) 6-7<sup>th</sup> February 18, [Wiesbaden](#) 17-18<sup>th</sup> April 18, [Paris](#) 15<sup>th</sup> May 18, [San Francisco](#) 11-12<sup>th</sup> September 18, [London](#) 2-3<sup>rd</sup> October 18, [Zurich](#) 13-14<sup>th</sup> November 18.

### Programme, Speakers and Audience

The Forum [programme](#) was based on recommendations and several months of research. However, it is thanks to our [77 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 20 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 2017 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 2017/2018: Get in touch and secure your place: We very much looking 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:

- 175 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

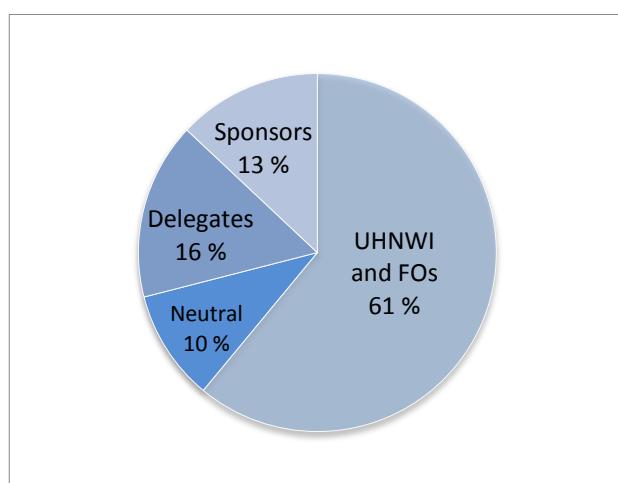
## 287 attendees in total

(Tuesday 260, Wednesday 230 attendees; average median number was 240 at any given time)

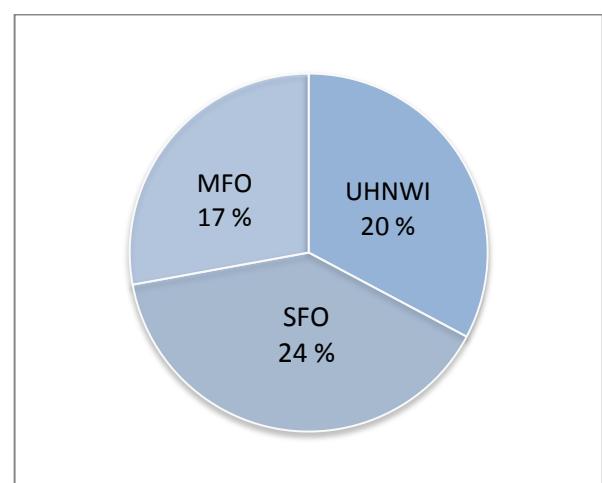
		Assets under Management
<b>175 Family Officers und UHNWI</b>	<b>61 %</b>	
✓ 57 UHNWI	20 %	> 37 bn *
✓ 69 Single Family Officers	24 %	> 60 bn *
✓ 49 Multi Family Officers	17 %	> <u>24 bn</u> *
		> 121 bn *
<b>29 Neutrals</b>	<b>10 %</b>	
✓ 12 Neutral Academics	4 %	
✓ 11 Neutral Experts	4 %	
✓ 6 Neutral Guest	2 %	
<b>46 Delegates (42 companies)</b>	<b>16 %</b>	> 24 bn *
<b>37 Sponsor delegates</b>	<b>13 %</b>	> 400 bn *
✓ 20 Sponsor companies	7 %	
✓ 17 Additional Sponsor Delegates	6 %	
	<b>Total 100 %</b>	<b>&gt; 545 bn*</b>

\* Conservative estimate

## Attendee Composition



## Family Office Composition



## Testimonials

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**

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**

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. The Platinum of all Family Office Summits, two spectacular days. The highest standard of excellent in every way imaginable! The various panels and roundtable discussions were of the highest order as were the Family Office attendees. A true reflection on the Family Office Forum's excellent reputation that you had in attendance and speaking on a panel, two of the main principles from the Grosvenor Family. Thank you very much for a most stimulating, interesting and high grade 2-day Family Office conference.

**Wendy Coumantaros, Spear's**

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.

**JJ Jardine-Paterson, Principal**

Very interesting, well organized and divers - this is what I call "time well spent"!

**Akbar R.C. van Leeuwen, LL.M., Founder & Managing Partner, Haegeborgh Family Office**

Terrific event - particularly gratifying due to the program, the attendees from around the world with perspectives on both the family / investments side and the lovely venue!

**Stephen McCarthy, KCG Capital**

A stunning example of how a successful event connects people, breeds innovation, builds communities and most importantly sparks change.

**Aradhana Khowala, CEO & Founder - Aptamind Partners, Member of the Advisory Board - World Tourism Forum Lucerne**

I just wanted to say congratulations to you and the team on the event, it was well planned and run. Convinced my Board to move our Board Meeting to Dubai on the strength of my positive experiences at your Zurich and London Forums, which I hope illustrates how highly we now regard them.

**Rakesh Chand, Kaura Foundation**

Congratulations for the event! It was well organized, everything went smoothly and the organizers were discretely in the background in the most positive sense. The sessions I attended 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 backgrounds. I enjoyed the many conversations very much. So, in short, it were two days well invested - definitely an event I can recommend without hesitation!

**András Gosztonyi**

For me it was incredibly exciting to exchange views with other Family Offices on various investment options at such a high level in these difficult times. Thank you very much for creating a platform for this.

**Michael Prinz zu Salm-Salm**

Very well attended, and great attention to detail on the part of the organisers.

**David Badham, World Gold Council**

I have never before met so many representatives from Family Offices at one single event. I would not have thought it possible to persuade so many Family Offices to join one event. It is rare to find so much expert know how in one room. Delegates and speakers alike were competent and relevant representatives of their field of expertise.

**Kay Behrmann, vv.de**

The Family Office Forum was a very pleasant surprise. The quality of the participants was very high and the ratio of the participants (in particular the fact that Family Offices were clearly in the majority) between Family Offices and asset managers and service providers was excellent. The event organisation was also perfect.

**Fons Lute, Cyrite Investment**