

Family Office Forum Zurich

Post-Event Report

The annual global meeting of UHNWI and Family Offices from around the globe
13 – 14 November 2018 (next Zurich event: 12 -13 November 2019)

Introduction

The Family Office Forum Zurich in November 2018 hosted **129** 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 2019: [Dubai](#) February, [Singapore](#) March, [Wiesbaden](#) April, [London](#) September, [San Francisco](#) September and [Zurich](#) November!

Programme, Speakers and Audience

The Forum [programme](#) was based on recommendations and several months of research. However, it is thanks to our **72** [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 13 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 2018 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 2019: 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:

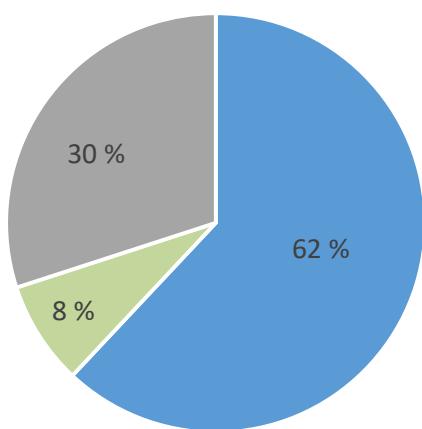
- 129 UHNWI and Family Offices attended the Family Office Forum
- The number of UHNWI and Family Offices was higher than the number of Solution Providers (A ratio of 2:1!)
- Excellent level of participants, who enjoyed the lively debates and networking opportunities

209 attendees in total

		Assets under Management
129 Family Officers und UHNWI	62 %	
✓ 36 UHNWI	17 %	> 37 bn *
✓ 43 Single Family Officers	21 %	> 60 bn *
✓ 50 Multi Family Officers	24 %	> <u>24</u> bn *
		> 121 bn *
17 Neutrals	8 %	
✓ 10 Neutral Academics	5 %	
✓ 4 Neutral Experts	2 %	
✓ 3 Neutral Guest	1 %	
42 Delegates (36 companies)	20 %	> 24 bn *
21 Sponsor delegates	10 %	> 400 bn *
✓ 13 Sponsor companies	6 %	
✓ 8 Additional Sponsor Delegates	4 %	
		<hr/>
	Total 100 %	> 545 bn*

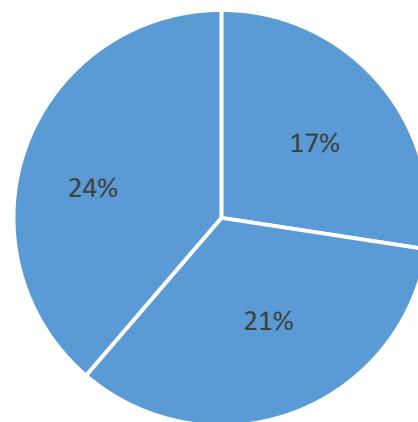
* Conservative estimate

Attendee Composition



■ FO + UHNWI ■ Neutral ■ Sponsors and delegates

Family Office Composition



■ UHNWI ■ SFO ■ MFO

Testimonials

It was really a well-prepared event with many interesting participants.

Mikolaj Firlej, Kluz Ventures

It was a good experience joining your event. Looking forward to the Singapore one.

Chi Man Kwan, CEO and Founder, Raffles Family Office (MFO)

Vielen herzlichen Dank für die sagenhafte Veranstaltung. Ich habe so ein einmaliges Zusammentreffen mit einer so herzlichen Atmosphäre noch nie erlebt.

Maximilian G. Gehrman, Geschäftsführender Gesellschafter, Gehrman Capital GmbH

Congratulations! It was a terrific event which in my view was an excellent combination of learning, business and social networking and fun.

Miguel Burguet, Managing Director, Marlowe Capital Ltd.

I would like to thank you for this great event you and your team organised in Zurich, full of insight, with a lot of excellent participants and with an outstanding diversity of topics and speakers.

Vianney Mathonnet, Director - Family Office, KappaFrik Group

Thank you for the wonderful FO Forum! Everything was perfectly organized and very interesting.

Yuri Emelin, Principal, FP WEALTH SOLUTIONS SA

Both the London and Zurich 2018 events provided truly inspiring keynotes and very good exchange and networking opportunities.

Benedict Goette, Compass Capital AG, Zug

Congratulations once again on a phenomenal event last week. Brilliant speakers and as always super well organised. Great comments throughout.

Marcela Navarro, CEO & Co-Founder, Project X Global

Zurich was absolutely fantastic. I just love the people you bring together.

Courtney Clark, Founder, Aspen Peak Advisors

The event was superb and with a brilliant mix of engaged attendees and speakers.

Alex Stephany, Founder & CEO, beam.org

The two days were high value add in terms of the quality of the people presenting combined with the ability to mingle and meet with other family offices!

Andreas A. Phyrillas

Congratulations to a great organisation and this incredible group of experts you invited.

Anne-Marie Melster, Co-Founder & Executive Director, ARTPORT_making waves

Thank you very much for inviting us to the Zurich Family Office Forum. We have really enjoyed the event and the venue, but most of all we enjoyed the unique atmosphere created by you.

Sergey Bogatyrev, BBS (BEST BUSINESS SOLUTIONS) PTE. LTD.

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 other's' 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 discreetly 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