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PRESTEL AND PARTNER

# Family Office Forum Zurich

**10th - 11th November 2026**

The Dolder Grand



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**Ida Beerhalter**
*Investor, Advisor & Co-Head*
**Family Office**



**Michael Lee-Chin**
*Billionaire & Entrepreneur*



**Ivan Nikkhoo**
*Managing Partner*
**Private Single Family Office**



**Constance "Connie" Morgan**
*Publicist & Director*
**JP Morgan Dynasty**



**Liz Verwilghen**
*Principal*
**Private Single Family Office**



**Ajay Ramachandran**
*Co-Chair*
**Private Single Family Office**



**Tariq Fancy**
*Lecturer at Stanford GSB, Former Global Chief Investment Officer for Sustainable Investing*
**BlackRock**



**Özge Doğan**
*Founder*
**Karman Beyond Family Office**



**Donatella Ceccarelli**
*Family Officer & Board Member*
**DAF Private Office**



**Creedence Dengre**
*Chair, CEO & CIO*
**McKenzie Madden Family Office**



# JOIN 100+ FAMILY OFFICES & UHNWI

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# LIVING A BETTER LIFE: Best Practice in Governance and Investments

- **13 years of trusted Family Office conversations in Zurich**
- **Practical insights on governance, succession and legacy**
- **Investment perspectives for long-term wealth stewardship**
- **Open, confidential discussions between peers**

**FREE ENTRY** for private Family Offices & UHNWI*

* Invited without fee are all Family Offices and UHNWI looking after at least €120 million who do not have any offer for private wealth (products or services such as advisory).



# Join our Family Office Forum in Zurich

**10th - 11th November**
The Dolder Grand

Benefit from a 2:1 private family office and investor:expert ratio and meet 100+ Family Offices and UHNWI at the event!

The Prestel and Partner Family Office Forum Collection provides an exchange between family offices, wealth-owners, and only a select few partners on best practice in governance and investments.

Strictly no product presentations or specific pitches - topics covered are key issues for Family Offices and UHNWI.
These hands-on topics hold clear benefits for all participants.
The focus is on added value, trends, and strategies.

*"Thank you for hosting this extraordinary conference in Zurich."*

**BIJAN FOROODIAN**
Family Principal

*"A very well organised Forum with authentic Family Office participants and insightful discussions. The atmosphere made it easy to connect, exchange ideas, and gain real value from the sessions."*

**PETR STRAKOS**
Lion Beat Capital

*"The Prestel and Partner conferences are always a brilliant mix of interesting content, high profile attendants and a warm atmosphere. Congratulations!"*

**MIQUEL BURGUET**
Marlowe Capital

*"Fantastic event – the topics, presentations and the guests were outstanding!"*

**CHRISTOPHER KNOTHE**
SFO

Enjoying the event?
Share your thoughts with us.

## Signature Features and Formats

- Interactive presentations and engaging panel discussions; with high number of family principals sharing their views
- In-depth round table discussions
- All-day networking, in addition to dedicated networking breaks, lunches, and reception

## About Us

With our eleven well-established annual family office forum editions in Dubai, Singapore, London, Frankfurt (formerly Wiesbaden), Chicago, New York, Los Angeles, Bermuda, Mexico, Zurich and Riyadh, Prestel and Partner is proud to be a global leader in providing a private platform for networking, sharing, and learning opportunities on the most pertinent family office and investment themes.

## Editorial Notes

We are editorially independent; our forum agendas are the result of extensive conversations and months of research with Single and Multi Family Offices, UHNWIs, thought-leading advisory firms and financial institutions on the most crucial and timely topics that keep family principals and their family offices awake at night and offer inspiration to them. We don't take commissions from selling anything, and are committed to staying neutral.

## Privacy Considerations

Our great respect for personal privacy ensures any attendees (including royals, billionaires, former heads of state, and Single Family Office Principals, CIOs and CEOs) enjoy the event with total data privacy.

# Your Advantage

### THE AUDIENCE

Our event is exclusively dedicated for Single Family Offices, Principals and Private Multi Family Offices who do not offer services or products but come to network and learn. At our event all other Family Offices and Experts who act as advisors or consultants or who offer products and/or solutions to third parties are considered to be solution providers.

### THE CONCEPT

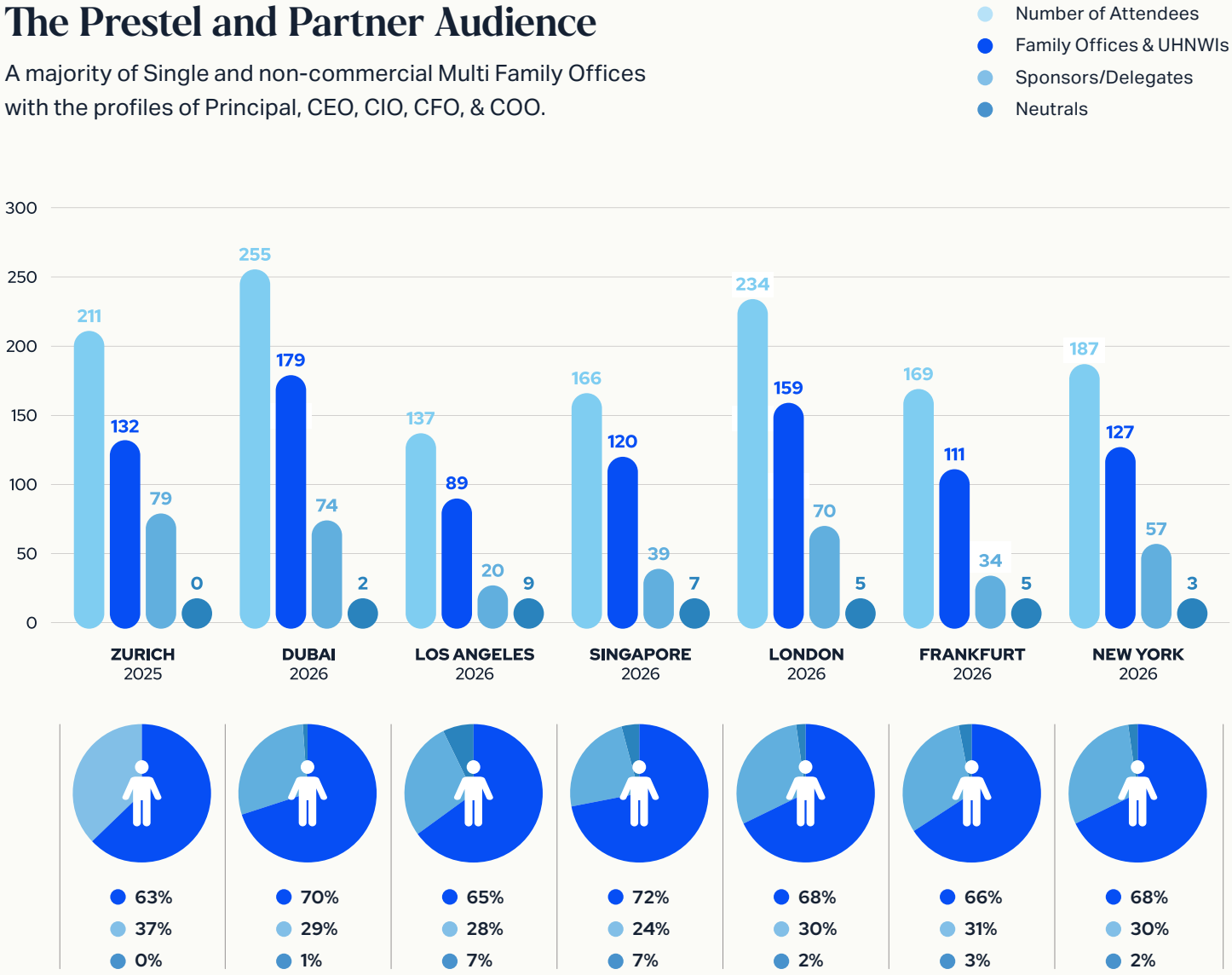
More Family Officers than solution providers on stage and in the audience. Network with 100+ Family Offices and UHNWIs.

### THE CONTENT

Bespoke and curated program with considerable time dedicated to in-depth discussions, knowledge and experience sharing and learning opportunities, and Q&As.

## The Prestel and Partner Audience

A majority of Single and non-commercial Multi Family Offices with the profiles of Principal, CEO, CIO, CFO, & COO.




Service providers are from various fields such as health, travel, international structuring, software, education or luxury goods – not uniquely from the financial industry. Partners contribute with and offer their expertise, without any upfront product sales.

# PROGRAMME · DAY 1
Tuesday · 10th November 2026

**Morning Session**

**8:00** **REGISTRATION AND NETWORKING WITH REFRESHMENTS** - Meet other Family Offices and UHNWI

**8:50** **WELCOME AND INTRODUCTIONS FROM PRESTEL AND PARTNER**

## HOW A FAMILY OFFICE MAKES SENSE

**9:00** FIRESIDE CONVERSATION

### YOU'VE MADE A LOT OF MONEY... WHAT NEXT?

Why it makes sense for wealthy Entrepreneurs (and those with a liquidity event) to have a Family Office

**Dr. Donatella Ceccarelli** - *Family Officer & Board Member*, DAF Private Office
**George Straschnov** - *Managing Director*, Bisk Ventures (SFO)
**Filipe Trigo Gonçalves** - *Chairman & President*, Asia Partners Private Capital

**9:20** PANEL DISCUSSION

### BEHIND THE SCENES OF ESTABLISHING A SINGLE FAMILY OFFICE

- From asset allocation to the implementation of a private markets portfolio — dos and don'ts
- How do you find the right assets (i.e., people, lawyers) for the assets? The cost of the learning curve

**Matthias Loos** - *Geschäftsführer & CIO*, Luxulyan Family Office
**Johannes Riedl** - *CEO*, Ray Family Office
**Ida Beerhalter** - *Co-Head*, IOME Family Office
Moderated by: **Thomas Scheffler** - *CEO*, Fortefolio AG

**9:40** PANEL DISCUSSION

### HAVING A LONG-TERM HORIZON: Family Office Investments & Succession

- Building bridges between early-stage innovation and long-term capital
- How family offices can collaborate with founders, venture capital firms, universities, and incubators to access emerging opportunities
- Thinking about long-term transition and short-term returns

**Louise Woltz-Smith** - *Managing Director*, Private Equity, Apogem Capital by New York Life Investment Management
**Filipe Trigo Gonçalves** - *Chairman & President*, Asia Partners Private Capital
**Sonakshi Agarwal** - *Portfolio Manager*, Scan Group (Private Single Family Office)
**Ajay Ramachandran** - *Co-Chair*, (Private Single Family Office)
Moderated by: **Catherine Shiang** - *Managing Director*, Asia Capital Advisor Ltd (Private Single Family Office)

**10:10** KEYNOTE

### KEEPING IT ALL TOGETHER: Sophisticated Asset Oversight And Governance, With Technology

Achieving genuine control over your assets, through transparency, cost control, governance, operational oversight and data ownership

**Kerstin Mumenthaler** - *CEO*, AX Analytics

**10:40** **MORNING COFFEE & REFRESHMENTS**



# PROGRAMME · DAY 1
Tuesday · 10th November 2026

# Morning Session

**11:00** KEYNOTE

## THE TRANSITION OF THE FOOD SYSTEM
## One Of The Biggest Challenges & One Of The Biggest Opportunities Of Our Time

**Olaf Koch** - *Partner*, ZINTINUS - *Former Board Member*, Mercedes Car Group - *MD*, Permira - *Supervisory Board*, Hugo Boss AG - *CFO, then CEO*, METRO AG

## REAL ASSETS
In the Ballroom

## FAMILY GOVERNANCE
In Garden Salon 1

**11:30** PRESENTATION

### SHIPPING: The Invisible Backbone of Global Trade

- What does the industry look like today
- Geopolitics and disruption to the market cycles
- Sustainability, sense and nonsense

**Lorenz K. Altwegg** - *CEO*, Swiss Maritime Capital

PRESENTATION

### THE PSYCHOLOGY OF IDENTITY AND PURPOSE ACROSS GENERATIONS

**Laura Bowden** - *Consultant Psychologist*, JustForward
**Dr. Joel Harvey** - *Consultant Psychologist*, JustForward

**12:00** PRESENTATION

### UNDERSTANDING HOW PRECIOUS METALS ARE POSITIONED FOR GROWTH

**Rick Van Nieuwenhuyse** - *CEO*, Contango Silver & Gold

PANEL DISCUSSION

### HEALTHY CONFLICT IN THE FAMILY: Bursting The Belief Bubbles To Have Better Conversations

**Dr. Stephan E. Knobloch** - *Principal*, Single Family Office
**Lea Baumbach** - *Managing Partner*, Rudolf Baumbach GmbH
**Manfredi Mattei Filo della Torre** - *Principal* (Private Single Family Office)
Moderated by: **Dominik Von Eynern** - *Next-Gen and Director & Founding Member*, Family Hippocampus

**12:30** INTERACTIVE ROUNDTABLE - IN GARDEN SALON 2

### FINDING COMMON GROUND THROUGH LANGUAGE: Philosophy, Science, and Art in Conversation

An exchange of views, opinions, and experiences made - all interested are welcome to join

**Dr. Claudia Stadlmayr** - *Mathematician, Artist & Writer*, University of Neuchâtel
**Anthony Rothschild**
**Vincent Corver** - *Professional Steinway Pianist*
**Toby Ruckert** - *Entrepreneur, Inventor*

**12:30** FIRESIDE CONVERSATION

### HOW TO MANAGE COMPANIES LIKE RETURNS: Why a Single Family Office Began to Systematically Question The Long-Term Value of Its Companies

**Oliver Hagedorn** - *CEO & Founder*, Avesco
**Moritz Koch** - *Chairman*, KAEFER

PRESENTATION

### THE UPSIDE DOWN FAMILY OFFICE: Teaching Your Elders When the Lessons Skip a Generation (or two)

An introspective look at a middle-class upbringing in a wealthy family, with no awareness of its wealth or struggles

**Creedence Dengre** - *Chair, CEO & CIO*, McKenzie Madden Family Office

**13:00** **LUNCH & NETWORKING** - Meet other Family Offices and UHNWI



# PROGRAMME · DAY 1
Tuesday · 10th November 2026

# Afternoon Session

## TECH AS AN INVESTMENT THEME
In the Ballroom

## USING YOUR MONEY FOR GOOD
In Garden Salon 1

**14:20**

PRESENTATION

### HOW I ADDED UNCORRELATED REJUSTTURNS TO MY PORTFOLIO
The case for a liquid, market-neutral allocation

**Paul Claudius** - *Founder*, Sistematik

PRESENTATION

### FAMILY OFFICE INVESTING IN A "POST-ESG" WORLD WHY THE VEHICLE FAILED
**Tariq Fancy** - *Lecturer*, Stanford GSB - *Former Global Chief Investment Officer for Sustainable Investing*, BlackRock

**14:50**

FIRESIDE CONVERSATION

### AI VS. OUR CHILDREN: How to help the next generation win against AI for their first job
- From data to decisions
- Governance in the age of AI
- Building in-house vs buying solutions

**Kasper Ulf Nielsen** - *Partner & Co-Founder*, Investigate VC
**Naboth van den Broek** - *Principal*, Single Family Office - *Founder*, SevenAges Group
**Mikael Krogh** - *Partner & Founder*, Investigate VC

PRESENTATION

### THE HUMAN DIVIDEND: Investing in Health, Well-Being and Long-Term Value
**Rachel Hodgdon** - *President and CEO*, International WELL Building Institute (IWBI)

**15:20**

PRESENTATION

### THE BENEFIT OF UNDERSTANDING THE CONVERGENCE OF TECHNOLOGIES IN THE BLOCKCHAIN ECOSYSTEM
**Ruud Smets** - *Managing Partner & CIO*, Theta Capital Management

PANEL DISCUSSION

### CREATING MONEY WHILE DOING GOOD
Perspectives for Family Offices that want to redefine purposeful capital

**Robert Rubinstein** - *Chairman & CEO*, TBLI Group
**Andrea Gori** - *Founder*, illuminem
**Prof. Julia Finkeissen** - *Principal*, Private Single Family Office
**Claus Fischer** - *Investor, Founder & CEO*, SanTerris

**15:50** **AFTERNOON COFFEE & REFRESHMENTS** - Meet other Family Offices and UHNWI



# PROGRAMME · DAY 1
Tuesday · 10th November 2026

# Afternoon Session

## LIVING A BETTER LIFE

**16:20** INTERACTIVE ROUNDTABLE - IN GARDEN SALON 2

### RETHINKING APPRENTICESHIPS IN THE AGE OF AI: What Can Family Offices, Founders & Corporates Build Together?

An exchange of views, opinions, and experiences made

**Kasper Ulf Nielsen** - *Partner & Co-Founder*, Investigate VC
**Mikael Krogh** - *Partner & Founder*, Investigate VC

**16:20** PRESENTATION - IN THE BALLROOM

### FROM CHAMPAGNE TO CHAOS: The Truth about Wealth and Mental Health

How To Talk About What You Cannot Talk About And Why You Should Do It Anyway

**Oliver Neubert** - *Founder & Chairman*, NEOVIVA

## LIVING A BETTER LIFE
In the Ballroom

## INVESTMENT KNOW-HOW
In Garden Salon 1

**16:50** PRESENTATION

### CELLS REMEMBER WHAT THEY WERE: What Your Body Can Teach You About Health

**Dr. Adeel Khan** - *Founder & CEO*, Eterna Health

FIRESIDE CONVERSATION

### QUANTUM, AI & VC IN CONVERSATION

Capital, Cybersecurity & the Quantum Transition

**Alexandra Beckstein** - *CEO and Founder*, QAI Ventures AG
**Liz Verwilghen** - *Principal*, Private Single Family Office

**17:20** PRESENTATION

### BEYOND THE BALANCE SHEET The Hidden Risks Facing Family Offices

**Adam Ciralsky** - *Emmy Award-winning, Investigative Journalist*, Vanity Fair / 60 Minutes
**Jay Truesdale** - *CEO*, TDI - *Global Intelligence and Risk Advisory*

PRESENTATION

### COPPER: A Critical Building Block Of The AI Boom

The realities of copper supply in the evolving geopolitical landscape

**Merlin Marr-Johnson** - *President & CEO*, Fitzroy Minerals

**17:50** PRESENTATION

### HYBRID THREATS IN EUROPE: How UHNWIs and Family Offices can build resilience today

**Damian Huntingford OBE** - *Founding Partner*, Prevail Partners
**Justin Hedges OBE** - *Executive Chairman*,, Prevail Partners

FIRESIDE CONVERSATION

### HOW AND WHEN A SUPERYACHT MAKES SENSE

**Geoff Moore** - *Managing Director*, West Nautical

**18:10** **Opening Of The Apéro Reception By Anthony Rothschild On The Topic Of Humanity**

**APÉRO RECEPTION AT THE DOLDER GRAND** - Sponsored by CONTANGO

**19:30** **END OF DAY ONE OF FAMILY OFFICE FORUM ZURICH 2026 EDITION**



# PROGRAMME · DAY 2
Wednesday · 11th November 2026

**Morning**
Session

**8:00** **REGISTRATION AND NETWORKING WITH REFRESHMENTS** - Meet other Family Offices and UHNWI

**8:10** EARLY NETWORKING

### FEMALE LEADERSHIP, ENTREPRENEURSHIP, AND INFLUENCE IN THE FAMILY OFFICE

Informal conversations over coffee: all invited to join an open conversation in the Ballroom

Moderated by: **Rebecca Weller** - *Event Director*, Prestel and Partner

**8:50** **WELCOME AND INTRODUCTIONS FROM PRESTEL AND PARTNER**

## FAMILY OFFICE KNOW-HOW

**9:00** KEYNOTE

### TAKE THE RISK. KNOW THE RISK.

Insights from my CIO roles with Global Wealth and Asset Managers

**Bjorn Jesch** - *Head of Family Office Coverage*, Allianz Global Investors

**9:30** PRESENTATION

### HOW IS THE WORLD CHANGING 50 YEARS IN 5 YEARS

How we are investing in the AI supply chain, manufacturing logistics, agentic software and tools

**Vishal Harishchandra** - *Founder, Chairman & CEO*, The Valkin Group

**9:50** KEYNOTE

### WAYS TO INNOVATE AND ENHANCE YOUR LEGACY

**Constance "Connie" Morgan** - *Publicist & Director*, from the American Morgan Dynasty

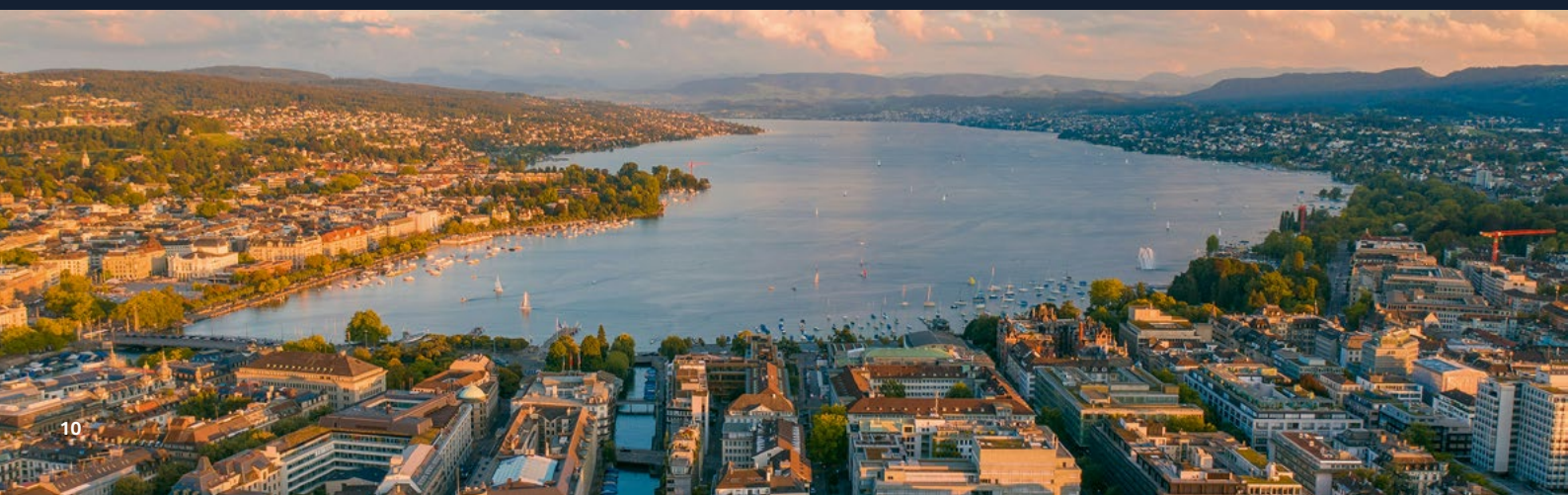
**10:10** FIRESIDE CONVERSATION

### BUILDING YOUR TRUSTED FAMILY OFFICE ECOSYSTEM

- Who belongs in your inner circle?
- Time, investment, and trust
- Discussing solutions when it goes wrong

**Bijan Foroodian** - *Investor*, Private Single Family Office
**Özge Doğan** - *Founder & CEO*, Karman Beyond
**Filipe Trigo Gonçalves** - *Chairman & President*, Asia Partners Private Capital

**10:30** **MORNING COFFEE & REFRESHMENTS** - Meet other Family Offices and UHNWI



# PROGRAMME · DAY 2
Wednesday · 11th November 2026

# Morning Session

**11:10** INTERACTIVE ROUNDTABLE - IN GARDEN SALON 2

### ENERGY TRANSITION: Navigating the Current Climate as a Family Office

*An exchange of views, opinions, and experiences made*

**Daniel Furey** - *Partner and Head of Global Capital*, Clear Sky

## ENERGY AS INVESTMENT THEME
In the Ballroom

## AI INVESTING UPDATE
In Garden Salon 1

**11:10** PANEL DISCUSSION

### FAMILY OFFICES & PRIVATE EQUITY TODAY

**Kim David Lexner** - *General Counsel, Head of Risk & Head of Compliance*, Calibrium AG
Moderated by: **Xavier Sarras** - *Principal & Next-Generation*, Private Single Family Office

PANEL DISCUSSION

### AI HUMANOIDS AND HYBRIDS: What is the Next Step in Human Robotics Evolution?

**Katrin J. Yuan** - *CEO*, Swiss Future Institute

**11:20**

FIRESIDE CONVERSATION

### THE REAL WORLD IMPACT OF AI ON PRIVATE CAPITAL INVESTING AND HOW FAMILY OFFICES CAN TAKE ADVANTAGE OF IT

**Vishal Harishchandra** - *Founder, Chairman & CEO*, The Valkin Group
**Ivan Nikkhoo** - *Principal*, Navigate Ventures (SFO)

**11:40** PRESENTATION

### CLOSING THE GAP: Understanding the Physical Infrastructure of AI and the Demand on Energy

**Ronen Faier** - *Technology Executive & Operating Partner*, SquareOne Labs

PRESENTATION

### THE EXECUTION ADVANTAGE: Making AI Work for Your Family Office

Understanding what Augmented AI execution looks like today

**Andreas Ehstand** - *Founder*, AUGMANITAI

**12:00** KEYNOTE

### GROWING INTERGENERATIONAL WEALTH IN AN ERA OF TRANSFORMATION: The Nuclear Opportunity

**Michael Lee-Chin** - *Jamaican-Canadian Billionaire Businessman, Philanthropist, Chairman & CEO*, Portland Holdings

**12:10**

PRESENTATION

### HOW DO YOU USE YOUR DATA FOR SUCCESS: Data Management and Analytics for Family Offices and UHNWI

**Christian Fauvelais** - *Co-Founder*, Cornspring
**Vishal Harishchandra** - *Founder, Chairman & CEO*, The Valkin Group
**Ajay Ramachandran** - *Co-Chair*, Private Single Family Office

**12:40** **LUNCH & NETWORKING** - Meet other Family Offices and UHNWI

# PROGRAMME · DAY 2
Wednesday · 11th November 2026

# Afternoon Session

**13:40** FLASH KEYNOTE

## WHY BIG FORTUNES DECLINE: How Not To Lose Your Wealth

**Prof. Martin Schmalz** - *PhD, Professor of Finance, Economics, and Real Estate*, Saïd Business School, Oxford University

## INVESTMENT KNOW-HOW
In the Ballroom

## MIND, BODY & SOUL
In Garden Salon 1

**14:00** PANEL DISCUSSION

### PUBLIC VS PRIVATE MARKETS: Understanding the Trends Today

**Rick Van Nieuwenhuyse** - *CEO*, Contango Silver & Gold
**Alistair Wilson** - *Partner and Member of the ESG Committee*, TwentyFour (a boutique of Vontobel)
Moderated by: **Tobias Prestel** - *Partner*, Prestel and Partner

**14:30** PRESENTATION

### CREATING GROWTH EQUITY THROUGH AI ENABLED INVESTING TODAY

**Doyl Burkett** - *Managing Partner*, Integrity Growth Partners

**15:00** FIRESIDE CONVERSATION

### FAMILY OFFICES, VC'S & START-UPS: How Can Investors Predict the Unpredictable?

**Luisa Düsberg** - *Principal*, Burda Principal Investments GmbH & Co. KG
In conversation with: **Christoph Roos** - *VC investor and Strategic Advisor*, Finkeissen Holdings

PANEL DISCUSSION

### WAYS TO STAY HEALTHY AND HOW TO ENRICH YOUR LIFE

- Considering different therapies and treatment for longevity and rejuvenation
- The role of biology and belief in slowing deterioration of cognitive functions
- Practical steps to be taken to protect people we care for
- The need to act before succession planning gets messy

**Richard Emanuel MBE** - *Principal*, Single Family Office - *Co-Founder*, Brain Health Network
**Toby Ruckert** - *Entrepreneur, Inventor*
**Dr. Adeel Khan** - *Founder & CEO*, Eterna Health

**15:30** **AFTERNOON COFFEE & REFRESHMENTS** - Meet other Family Offices and UHNWI



# PROGRAMME · DAY 2
Wednesday · 11th November 2026

# Afternoon
Session

## PURPOSE IN ACTION

**16:10** PANEL DISCUSSION

### THE "MUSKONOMY" AND THE DEATH OF ESG: What Next?

**Tariq Fancy** - *Lecturer*, Stanford GSB - *Former Global Chief Investment Officer for Sustainable Investing*, BlackRock
**Robert Rubinstein** - *Chairman & CEO*, TBLI Group
In conversation with: **Matthias Knab** - *Founder*, Opalesque

**16:40** PRESENTATION

### GOING WILD:
### How To Engage The Local Community, Save Nature, And Make A Long-Term Impact

**Christoph Promberger** - *Executive Director*, Foundation Conservation Carpathia

**17:10** GRAND FINALE

### CREATING A SOUNDTRACK FOR YOUR LIFE

**Vincent Corver** - *Official Steinway Pianist*

**17:40** **END OF THE PRESTEL AND PARTNER FAMILY OFFICE FORUM ZURICH 2026 EDITION**



# The Prestel and Partner Promise

More Family Offices on stage than service providers. More Family Offices in the audience than service providers. For further information on the composition of our audience please see: **www.prestelandpartner.com**

Free participation is exclusive to Family Offices and only genuinely relevant partners of Family Offices will be able to purchase a delegate pass. In addition, the number of delegate passes is strictly limited. This ensures that the participating Family Offices enjoy a meeting among peers.

*Our definition of a Family Office is serving one or a few Principals only, not providing 3rd party services and solutions to others and demanding a min. fortune of $150 million+

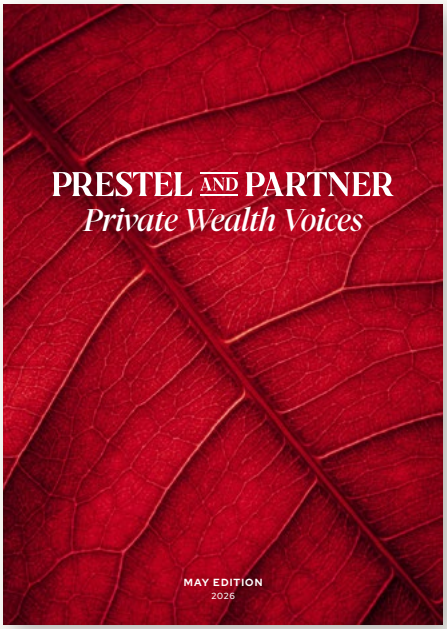
If you want to become a partner please contact: **office@prestelandpartner.com**

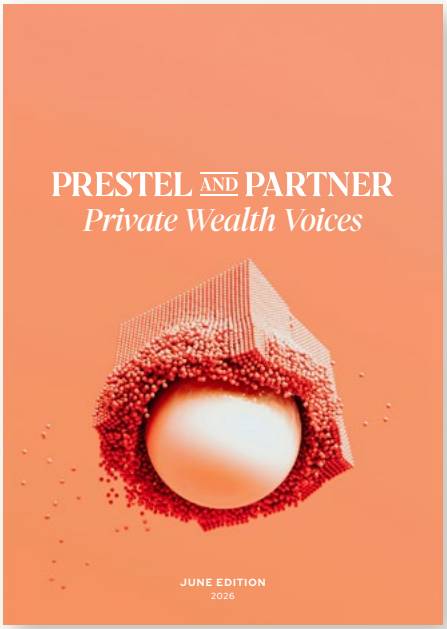
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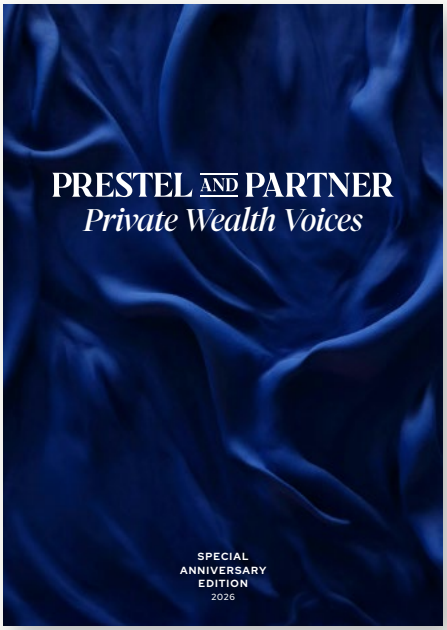
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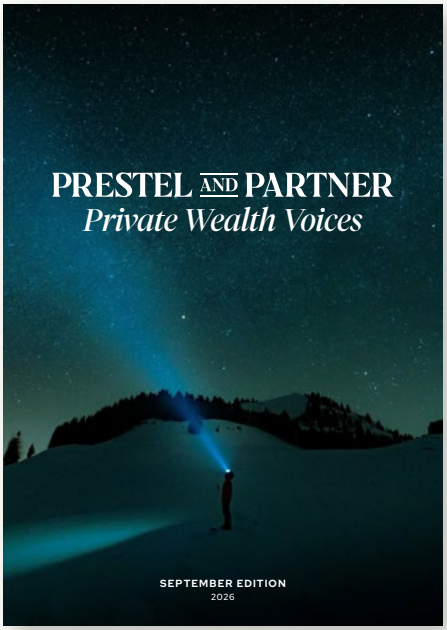


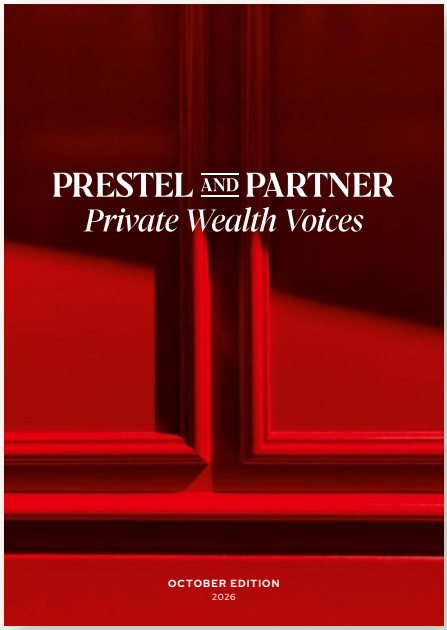









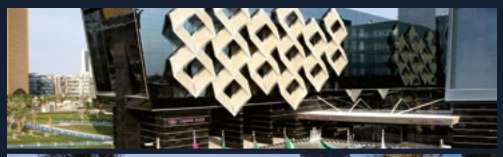
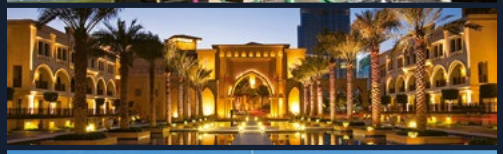

# READ OUR TIMELESS AND TIMELY CONTENT

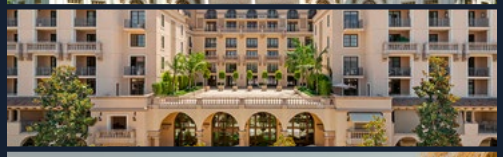
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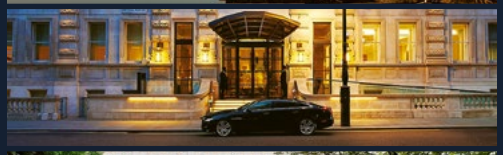
Interested in contributing your thought-leadership?
**pwv@prestelandpartner.com**

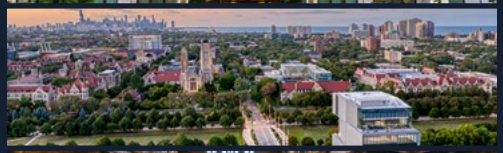
# PRESTEL AND PARTNER

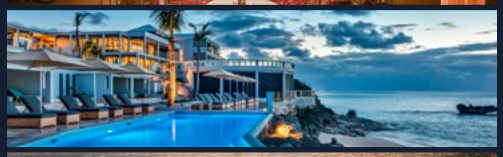
# THE FAMILY OFFICE FORUM COLLECTION










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|---|---|---|
| FORUM | **DUBAI**<br>**16th · 17th March 2027**<br>The Palace Downtown Hotel | Join 100+ Family Offices and UHNWI from the Middle East and beyond to discuss Best Practice in Governance and Investments. |
| FORUM | **RIYADH**<br>**6th · 7th April 2027**<br>Crowne Plaza Riyadh RDC | Join 100+ Family Offices and UHNWI from the Middle East and beyond to discuss Best Practice in Governance and Investments. |
| FORUM | **SINGAPORE**<br>**20th · 21st April 2027**<br>Raffles Hotel | Join 100+ Family Offices and UHNWI based in Asia and beyond for this unique forum. |
| FORUM | **LOS ANGELES**<br>**2nd · 3rd June 2027**<br>The Maybourne Hotel | Meet 100+ Family Offices and UHNWI based in North America and beyond to discuss key family office topics. |
| FORUM | **LOS CABOS**<br>**9th · 10th June 2027**<br>Solaz Resort | Where 100+ Family Office and UHNWI from Mexico gather on governance & investment best practice. |
| FORUM | **LONDON**<br>**1st · 2nd July 2027**<br>The Corinthia | Meet 100+ Family Offices and UHNWI based in the UK and beyond to learn from each other. |
| FORUM | **FRANKFURT**<br>**15th · 16th September 2027**<br>Sofitel Frankfurt Opera | Join us when 100+ genuine* German-speaking Family Offices meet. |
| INDUSTRY EVENT | **CHICAGO**<br>**13th · 14th October 2027**<br>The David Rubenstein Forum | Join 500+ experts in private wealth as they discuss latest market trends and best practice & solutions for clients. |
| FORUM | **NEW YORK**<br>**19th · 20th October 2027**<br>The Harvard Club | Meet 100+ Family Offices and UHNWI based in North America and beyond to discuss key family office topics. |
| RETREAT | **BERMUDA**<br>**22nd · 23rd October 2027**<br>The Loren Residence | Where a select group of only 40 Families gather for an informal retreat, sharing insights about private wealth. |
| FORUM | **ZURICH**<br>**9th · 10th November 2027**<br>The Dolder Grand | Join 100+ Family Offices and UHNWI from all over the globe to share insights and learn from each other. |


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## A SAFE PLACE FOR FAMILY OFFICES