



# Family Office Leadership

---

## SUMMIT:ASIA

14<sup>th</sup> May 2013  
Raffles Hotel  
Singapore

---

# Event Guide

---

Sponsors:



Development Office



Hosted by:



09:05 MORNING REGISTRATION

**Chairman's welcome and opening keynote:**

Graham Reeve, Managing Director of Family Office and Wealth Services, THE MYER FAMILY COMPANY

10:00

**Roundtable discussion: Asset allocation and evaluating risk**

This roundtable will feature leading investors who will detail their strategies for ensuring their portfolio is prepared whatever the economy has in store for us and will share their thoughts on the global investment landscape. "Where can I get the highest ROI" is a key question faced by family offices and this roundtable will discuss the variety of options available to family offices in the region.

- Investment returns and asset classes – where to allocate?
- Does having multiple managers ensure diversification?
- A look beyond: international diversification
- Liquidity and returns

*Moderator:*

Dilip Parameswaran, Founder and Chief Executive, ASIA CREDIT ADVISORS

*Speakers:*

Seppo Leskinen, CEO and Founder, KARELIA ASIA PACIFIC

Peter Gibson, CEO, DYNASTY FAMILY OFFICE

Grant Williamst, Portfolio Manager, VULPES INVESTMENT MANAGEMENT

Himanshu Kohli, Founder Partner, CLIENT ASSOCIATES

11:00

MORNING BREAK

11:30

**Presentation: Finding Your Philanthropy Partner**

*Speaker:* Terry Alan Farris, Chief Development Officer, NANYANG TECHNOLOGICAL UNIVERSITY

11:50

**Presentation: The role of philanthropy in a family office**

A growing number of wealthy families are turning to family offices as a way of managing their philanthropic giving - a move with numerous benefits, but not without challenges. In this session, the speaker will outline what philanthropy has to offer to family offices.

- The recurring question of what philanthropy offers a family office?
- The growth of philanthropy in the Asian region
- The new philanthropy: impact investing, social entrepreneurship, social investment bonds etc – the next frontier or old wine in new bottles?

*Speaker:* Dr Michael Liffman, Founding Director and Senior Fellow, SWINBURNE UNIVERSITY and ex CEO, THE MYER FOUNDATION

12:30

LUNCH

13:30

**Keynote address: Building family fortunes across the generations: The role of the single family office**

In a world of growing complexity, the single-family office plays an increasingly important role in dynastic wealth. In his keynote session, Charles Lowenhaupt provides a strategic and functional overview of the modern family office. He also will focus on the special challenges facing Asian families seeking freedom from the burdens of significant wealth. The session will

- Outline a working model for family offices that can transfer wealth smoothly across generations
- Discuss the need for industrial strength due diligence to achieve freedom from wealth
- Describe how independence and transparency in a family office can help individuals and families achieve their often different objectives

*Keynote speaker:* Sean Cortis, CEO, LOWENHAUPT GLOBAL ADVISORS

14:10

**Debate: The role of advisors**

A head to head debate in which we question how much we should rely on advisors. Should we outsource everything to a trusted advisor or advisors? How much control should we retain? Will we ultimately cause more problems by remaining "too" involved in investment matters we know nothing about?

*Speaker 1: The Advisor – "why my services are necessary"*

*Speaker 2: The Family Office – "why I must have control and responsibility"*

- How much should we rely on advisors?
- Retaining control over investments
- Outsourcing to a trusted advisors

*Moderator:*

Dr Michael Liffman, Founding Director and Senior Fellow, SWINBURNE UNIVERSITY and ex CEO, THE MYER FOUNDATION

*Speakers:*

Noor Quek, Founder/Managing Director, NQ INTERNATIONAL

Peter Gibson, CEO, DYNASTY FAMILY OFFICE

14:50

AFTERNOON BREAK

15:10

**Expert panel discussion: Resolving Family Conflict**

Internal family conflict is prevalent among the ultra-rich families in Asia causing disintegration of businesses controlled by the Asian families. Resolving these conflicts becomes an important issue for preserving the business. This session will address the "conflict" issues faced by family businesses and the best way to address them.

- Dealing with differences
- The role of the family office/advisor in mediating
- Case studies and solutions

*Moderator:*

Greg Spiro, Managing Director, SPIRONICHOLSON

*Speakers:*

Carol Seah, Founder and Chief Executive Officer, WYNNES FAMILY OFFICE

Cheong Wing Kiat, Family Business Strategist, BUSINESS CONCEPT

Deborah Webster, Partner, AHL ADVISORS

Graham Reeve, Managing Director of Family Office and Wealth Services, THE MYER FAMILY COMPANY

16:00

**Case Study: Setting up a family office — Lessons from one of the oldest family offices in the world**

- Setting up a family office: are there really best practices? Is your family ready to set up and govern a family office?
- An example of how a large international family has set up his family office and how it has evolved in a multi family office maintaining the same DNA of the past.
- Is it really a family office the structure you need or do you need something else?

*Speaker:* Francesco D'Amico, Head of Clients and Member of the Executive Committee, QUILVEST FAMILY OFFICE

16:30

DRINKS RECEPTION