



#GC19

GENERATIONS CONFERENCE 2019

PRIVATE EQUITY – INVESTING FOR GENERATIONS?
AN INDEPENDENT FORUM FOR FAMILY OFFICES AND ASSET OWNERS

RÜSCHLIKON 25 MARCH 2019

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CFA Society
Switzerland

Dear Family Office professional,

Over the past months, we've heard many industry leaders articulate their vision for the future of Family Offices and how they would seek to manage the wealth of present and future generations of wealthy families.

It's this passion for investing with a purpose that we'll try to capture in the second edition of the Generations Conference 2019, "Private Equity – Investing for Generations?" Claudia Zeisberger, an INSEAD business professor who extensively studies Private Equity, will explain why she's such a tenacious advocate for making PE investing in emerging markets more accessible. Justin Rockefeller, an American impact investor, will share his thoughts about how impact investing is heating up, what makes it more appealing to people from all walks of life and also creates a good impact on the environment. Finally, an expert panel of speakers will explain how tech (ICO) and crypto investing will be crucial to the changing business of investing. More speakers are confirmed, but you be the judge: read on and let us know what you think.

We look forward to welcoming you next year at the Generations Conference 2019,



Chris Dreyer CFA
Chief Executive Officer, CFA Society Switzerland



Eugene Skrynnyk
Treasurer & Board Member, CFA Society Switzerland

PS: Bring a little CFA Society Switzerland into your daily life!

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#GC19 Generations Conference

The annual Generations Conference is an independent, personable forum of education dedicated to the real issues and unique challenges facing family businesses, Family Offices and Family Foundations as well as asset owners. Generations Conference 2019 offers a one day programme to a select number of professionals working for Family Offices to connect with like-minded thought leaders and peers in the industry and discuss challenges, leading practices and trends in Family Office private investing and much more.

CONFERENCE SPEAKERS



Prof. Claudia Zeisberger | Senior Affiliate Professor of Decision Sciences and Entrepreneurship and Family Enterprise at INSEAD



Adj. Prof. Dr. Martin Haemmig | Adjunct Professor at CeTIM in Germany and The Netherlands and a global academic network partner for GLORAD



Dr. Hans Kuhn
Partner at Zulauf Partners



Dr. Lidia Bolla CFA
CEO of vision&



Guido Bühler
CEO of SEBA Crypto AG



Nicolas Brand
Partner at LAKESTAR Venture Capital



Steffen Wagner
Co-CEO and co-founder of investiere



Valerio Roncone
Head Future Business and Member of the Management Committee at SIX



Prof. Dr. Peter Lorange
Founder, Chairman and CEO of the Lorange Network



Simon de Pury
Founder of de Pury de Pury and active charity auctioneer



Amber Gao
Consulting Manager at Loong



Manuel Salvisberg CFA
Managing Director of Sigg Family Office



Justin Rockefeller
Co-founder of The ImPact and Board Member of the Rockefeller Brother Fund



Dr. Eugene Durenard
Managing Director of Stetson Family Office

CONFERENCE HOST AND MODERATORS



Marius Holzer CFA

CFO/COO of Parkview Group



Prof. Denise Kenyon-Rouvinez

Director of the IMD Global Family Business Center at IMD



Christian Dreyer CFA

CEO of CFA Society Switzerland

GC18 TESTIMONIALS

« Depth of presentations was surprisingly well done. »

« This conference is well suited for decision makers, people with good background on financial matters. »

« I recommend Generations Conference to people who work in Family Offices, but also to principals. »

« This conference is really about the topic and creating virtual fin-tech where people can exchange views and gain views and experiences. »

« The conference is very well balanced in terms of topics, anyone who works in a Family Office will have his/her takeaways. »

« Fascinating event, excellent speakers, great networking! »

OVERVIEW OF TOPICS

- **Mastering Private Equity** in the Family Office Environment
- **Four Generations** of Family Office Private Equity Investing
- **Adventures in the Art Trade** and Increasing Role of Family Offices
- **Global Venture Capital Investing:** Approaches and Options of Start-up Investing for Family Offices
- **Impact Investing** by Family Offices for Future Generations
- **Investments** in Shipping & Logistics
- **How to Invest and Opportunities in Asia** for Family Offices and HNWIs
- **Crypto Investing:** The Changing Business of Investing

WHO SHOULD ATTEND?

The Generations Conference welcomes professionals from the Family Office (FO) industry across the globe who work with U/HNWI family principals, representatives, or asset owners, and encourages attendance from:

- Single-Family Offices – senior FO professionals and executives
- Multi-Family Offices – senior FO professionals and executives
- Trusted investment advisors and specialists working with FOs (consultants or advisors hired by clients to advise on investments)
- Banking specialists working in dedicated FO or Financial Intermediaries desks and responsible for servicing or advising FOs

Registration is subject to approval.

Limited number of tickets is available to Members and Candidate Members of CFA Society Switzerland, CFA Program candidates and other Societies adhering to the CFA Institute Society Passport Program.

PRICE

- **Delegates:** Early Bird Special 740 CHF (ends on 31 January; afterwards 925 CHF)
- **Members of CFA Society Switzerland and other Societies (Passport Program):** Early Bird Special 520 CHF (ends on 31 January; afterwards 640 CHF)
- **Additional discounts** are available for Family Offices and group registrations (more than 2); please enquire by sending us an email.

LOCATION

The Swiss Re Centre for Global Dialogue is a premier conference facility located just outside of Zurich in a private and confidential environment. It is also in an idyllic position for views of the lake and mountains and is located only 15 minutes by road or train from the Zurich Main Train Station.

REGISTRATION | FAQs

To register go to the website

swiss.cfa/events/gc19

To ask a question email

generations@swiss.cfa

or call CFA Society Switzerland

+41 41 741 00 74



#GC19 Conference Agenda 25 March 2019

08.30 Registration and refreshments

09.00 Welcome address

Marius Holzer CFA | *CEO/COO of Parkview Group, Conference Chairperson*

09.10 KEYNOTE PRESENTATION:

Mastering Private Equity in the Family Office Environment: PE landscape today, effective investing, pitfalls and best practices, case studies

Prof. Claudia Zeisberger | *Senior Affiliate Professor of Decision Sciences and Entrepreneurship and Family Enterprise at INSEAD, Academic Director of INSEAD's Global Private Equity Initiative*

10.00 PRESENTATION:

Global Venture Capital Investing: Global VC, CVC, Startup overview, exits and performance, Unicorns

Adj. Prof. Dr. Martin Haemmig | *Adjunct Professor at CeTIM in Germany and The Netherlands, global academic network partner for GLORAD on venture capital, incubation and hi-tech startups*

10.45 Networking break

11.15 KEYNOTE MASHUP:

The changing business of investing

Valerio Roncone | *Head Future Business and Member of the Management Committee at SIX*

Dr. Lidia Bolla CFA | *CEO of vision&*

Nicolas Brand | *Partner at LAKESTAR Venture Capital*

Steffen Wagner | *Co-CEO and co-founder of investiere*

Dr. Hans Kuhn | *Partner at Zulauf Partners*

Guido Bühler | *CEO of SEBA Crypto AG*

Christian Dreyer CFA | *CEO of CFA Society Switzerland (Moderator)*

12.15 PRESENTATION: **Investments in shipping/logistics**

Prof. Dr. Peter Lorange | *Founder, Chairman and CEO of the Lorange Network*

13.00 Lunch break

14.00

PRESENTATION:

Adventures in the art trade and increasing role of Family Offices

Simon de Pury | *Founder of de Pury de Pury and active charity auctioneer*

14.35

PANEL: How to invest and opportunities in Asia

Prof. Claudia Zeisberger | *Senior Affiliate Professor of Decision Sciences and Entrepreneurship and Family Enterprise at INSEAD, Academic Director of INSEAD's Global Private Equity Initiative*

Justin Rockefeller | *Co-founder of The ImPact and Board Member of the Rockefeller Brother Fund*

Amber Gao | *Consulting Manager at Loong*

Manuel Salvisberg CFA | *Managing Director of Sigg Family Office*

Prof. Denise Kenyon-Rouvinez | *Director of the IMD Global Family Business Center at IMD (Moderator)*

15.30

Networking break

16.00

KEYNOTE PRESENTATION:

Impact investments by Family Offices for Future Generations

Justin Rockefeller | *Co-founder of The ImPact and Board Member of the Rockefeller Brother Fund*

16.50

PRESENTATION:

Four Generations of Family Office Private Equity Investing

Dr. Eugene Durenard, *Managing Director of Stetson Family Office*

17.30

Concluding remarks, farewell message and Apéro

Marius Holzer CFA | *CFO/COO of Parkview Group*



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