



#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 Skrynnik  
Treasurer & Board Member, CFA Society Switzerland

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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



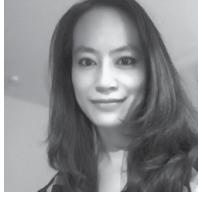
**Valerio Roncone**  
Head Future Business and Member of the Management Committee at SIX



**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

<b>To register go to the website</b>	<a href="http://swiss.cfa/events/gc19">swiss.cfa/events/gc19</a>
<b>To ask a question email</b>	<a href="mailto:generations@swiss.cfa">generations@swiss.cfa</a>
<b>or call CFA Society Switzerland</b>	+41 41 741 00 74



# #GC19 Conference Agenda 25 March 2019

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**08.30** Registration and refreshments

**09.00** Welcome address

Marius Holzer CFA | CFO/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

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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*

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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 ImImpact 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 ImImpact and Board Member of the Rockefeller Brother Fund*

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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*



## #GC19 AN INDEPENDENT FORUM FOR FAMILY OFFICES AND ASSET OWNERS



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