

# agenda

## CONFERENCE DAY 1 - Monday, 20 October 2014

**7:00 Registration & Sponsor Setup**

**9:00 Continental Breakfast**

**9:00 Closed Door Investor Breakfast**

*of* **Facilitators:**

Adi Divgi, President, **EA GLOBAL (SFO)**

Henrik Mikkelsen, Senior Partner, **STRATEGY & INVESTMENT MANAGEMENT (MFO)**

**10:00 PANEL DISCUSSION: APPROACHING 2015- WHAT IS YOUR STRATEGY?**

**Moderator:**

Oliver Rothschild, Chairman, **OLIVER ROTHSCHILD CORPORATE ADVISORS**

**Panelists:**

Anthony Ritossa, Chairman, EU Sovereign & Investment Advisory Board, **RITOSSA OLIVE OIL & FAMILY OFFICE**

Gus Drew, Managing Partner, **ARSAGO CAPITAL MANAGEMENT AG**

Charles Moore, Founder and President, **THE BANC FUNDS COMPANY, L.L.C.**

John Girard, Trustee, **BOCA RATON (FL) POLICE & FIRE RETIREMENT ASSOC.**

**10:55 Morning Sessions of One-on-One Meetings**

**13:00 Luncheon**

**14:30 PANEL DISCUSSION: DIRECT INVESTING AND CO-INVESTING**

- The real reasons and benefits of Direct and Co-Investing for Family Offices
- Discussion of current deals and examples of those rejected and not successful
- Locating and maintaining the right partners
- Areas of interest and ideas for the future

**Moderator:**

Jason Cavanagh, CEO, **SAINT LEONARD FAMILY OFFICE (SFO)**

**Panelists:**

Fahd Rachidy, CIO, **SPARROWS CAPITAL (MFO)**

Vaga il Bartalini, Director Wealth Management, **ANTHONY & CIE (MFO)**

Rohit Sarin, Founding Partner, **CLIENT ASSOCIATES (MFO)**

**15:25 Afternoon Sessions of One-on-One Meetings**

**17:30 Cocktail Reception**

# agenda



## CONFERENCE DAY 2 - Tuesday, 21 October 2014

9:00 *Continental Breakfast*

10:00 **PANEL DISCUSSION: GOLD, FARMLAND, ENERGY, AND DIAMONDS-  
WHAT REAL ASSETS ARE IN YOUR PORTFOLIO?**

- What are Real Assets to you and your organization?
- An allocation to Real Assets can play an important role in a long-term investment portfolio - What are your favorite real assets?
- Valuations, Diversification, and Liquidity .. Represent some of the key issues when it comes to Real investments. What would worry you the most in your current or future Real Assets allocations?

**Moderator:**

Rania Azmi, Strategic Advisor, **SWF-MENA -MIDDLE EAST**

**Panelists**

Alan Landau, CEO, **NOVEL ASSET MANAGEMENT**

Lee Robinson, CIO, **ALTANA WEALTH (MFO)**

Tim Wilkinson, President, **SCIENS CAPITAL**

Felix Kottmann, Managing Partner, **KOTTMANN ANALYTICS FAMILY OFFICE**

11:00 *Morning Sessions of One-on-One Meetings*

13:00 *Luncheon*

14:30 **PANEL DISCUSSION: STRATEGIC VS. OPPORTUNISTIC INVESTING**

**Moderator:**

Adi Divgi, President, **EA GLOBAL (SFO)**

**Panelists**

Luciana Soriano, Head of Global Investments, **SWISS TRUST ADVISORS CHINA**

Sharon Foulston, Chairman, **ALADDIN VENTURES**

Jorgen Eriksson, Director, **BEARING GROUP**

Markus Schuller, Founder, Managing Director, **PANTHERA SOLUTIONS**

15:25 *Afternoon Sessions of One-on-One Meetings*

17:00 *Cocktail Reception*

**Sponsored by:**

**EFG BANK (MONACO)**

15 Avenue d'Ostende, Monte Carlo, Monaco

## speaker biographies



### Adi Divgi, President, EA GLOBAL



Adi Divgi currently manages investments on behalf of his single family office, EA Global, and provides advisory services on alternatives to clients. Prior to EA Global, Mr. Divgi worked as a director at Auriga, managing a portfolio of US RMBS and Latin American corporate credits. Prior to Auriga, Mr. Divgi co-managed the secondary credit and structured finance portfolios at Patriarch Partners, with close to \$5 billion in assets under management. Mr. Divgi began his credit career at Deutsche Bank, working in the New York and Mexico City offices, first in secondary trading followed by principal finance and Latin American securitization. A graduate of the Huntsman Program, Mr. Divgi has a BA in International Studies and Spanish from the University of Pennsylvania, and a BS in Economics and MBA in Finance from the Wharton School.

### Gus Drew, Managing Partner, ARSAGO CAPITAL PARTNERS



Gus Drew is a managing partner of Arsago Capital Partners in Zurich with almost thirty years' experience of working in the financial industry. His primary responsibilities include structuring, documentation, due diligence, risk control and financial modelling. He was also responsible for the macroeconomic analysis leading to Arsago's primary focus upon Brazil. Gus's particular focus has been upon the Brazilian housing market, overseeing Arsago's real estate investments and coordinating closely between the General Partner in Luxembourg, the Brazilian developers and Arsago's local project management team in Sao Paulo, where he spends approximately three months of the year, spread over regular visits. Prior to joining Arsago in 2008, Gus spent some years managing private assets after five years at JP Morgan in Frankfurt and London, during which he headed the German bond and option operation. His previous experience included positions at Nat West Markets, Security Pacific and Mitsubishi Finance, heading the proprietary trading and European bond desks.

### Jörgen Eriksson, Director, BEARING GROUP



Jörgen Eriksson is the Founder and Chairman of Bearing Group, a London based strategy, finance and management consultancy, advising governments, regional governments, cities and corporations on economic development. During the past fifteen years he has successfully expanded Bearing to a client base across four continents. He is also Adjunct Professor of Innovation Management at the International University of Monaco and at the Universitat Politècnica de Catalunya. Previous to Bearing he was Director of EMEA for Wall Street Systems.

### Sharon Foulston, Chairman, ALADDIN VENTURES WORLDWIDE LTD



Sharon is chairman of Aladdin Ventures Worldwide Ltd, her personal brand aimed at making ethical and social investments both in the UK and abroad. She has 15 years experience of investing in a global context across the sectors of Life Sciences, Environment, property, films and community based projects. She is a member of the BBAA and active angel investor/mentor valued for business connectivity and strategic advice.

She has a BA in Business Studies and an MSc in Industrial Relations.

A keen sports woman she enjoys golf, hiking, biking and spending quality time with her daughter aged 10.

### John Girard, Trustee, BOCA RATON POLICE AND FIRE ASSOCIATION

John Girard has been a Trustee of the City of Boca Raton Police & Firefighters' Retirement for 28 years. His professional career encompassed President of the National Stock Exchange, Director of the