



Private meetings for the world's leading families

THE INDIAN FAMILY OFFICE CONFERENCE

29 & 30 November, 2016
Trident, Bandra Kurla • Mumbai , India

*India's premier private conference for family business leaders,
owners and next generation family members*

**From Family Business to Family Office:
Securing the family's future & legacy**

Main Partner:

MULTI ACT TRADE & INVESTMENTS

Professional Partner:

**AZB & PARTNERS
DSP BLACKROCK INVESTMENT MANAGERS
EY**

Organised by:

Campden Family Connect
Membership | Events | Research | Education
A Patni family & Campden alliance

In collaboration with:

Campden Wealth
Events | Publishing | Research | Education | IPI

THE INDIAN FAMILY OFFICE CONFERENCE

From Family Business to Family Office:
Securing the family's future & legacy

WELCOME

29 November, 2016

Dear Delegate,

We extend a very warm welcome to you for the Indian Family Office Conference 2016.

We have a full programme ahead of us, with sessions being led by a panel of distinguished speakers, who have so generously given their time to share their knowledge and experiences with us. We plan to keep proceedings as informal as we can, with each session having time set aside for questions and discussion.

We would like to thank all those who kindly assisted in planning this event; in particular our conference partners Multi Act Trade & Investments as well as our professional partners AZB & Partners, DSP Blackrock Investment Managers and EY.

You will find all the information about the conference that you are likely to need in this book. We would recommend you first read the 'Administrative Notes' and in particular ask you to note the point regarding mobile phones.

As we constantly strive to improve the quality of our event programmes, we are keen to hear your thoughts on the event and receive your feedback. There is a feedback form enclosed in the front of this workbook and we would greatly appreciate it if you could find the time to complete it.

Should you require any assistance concerning the conference or your stay in Mumbai please contact any member of the Campden Family Connect team as the event unfolds.

We wish you an enjoyable and stimulating few days.

Yours faithfully,



Amit Patni
Director
Campden Family Connect



Dominic Samuelson
Chief Executive Officer
Campden Wealth

PRESENTATIONS



Traditionally, Campden included all available speaker presentations in the workbook for delegate reference in a monochrome format.

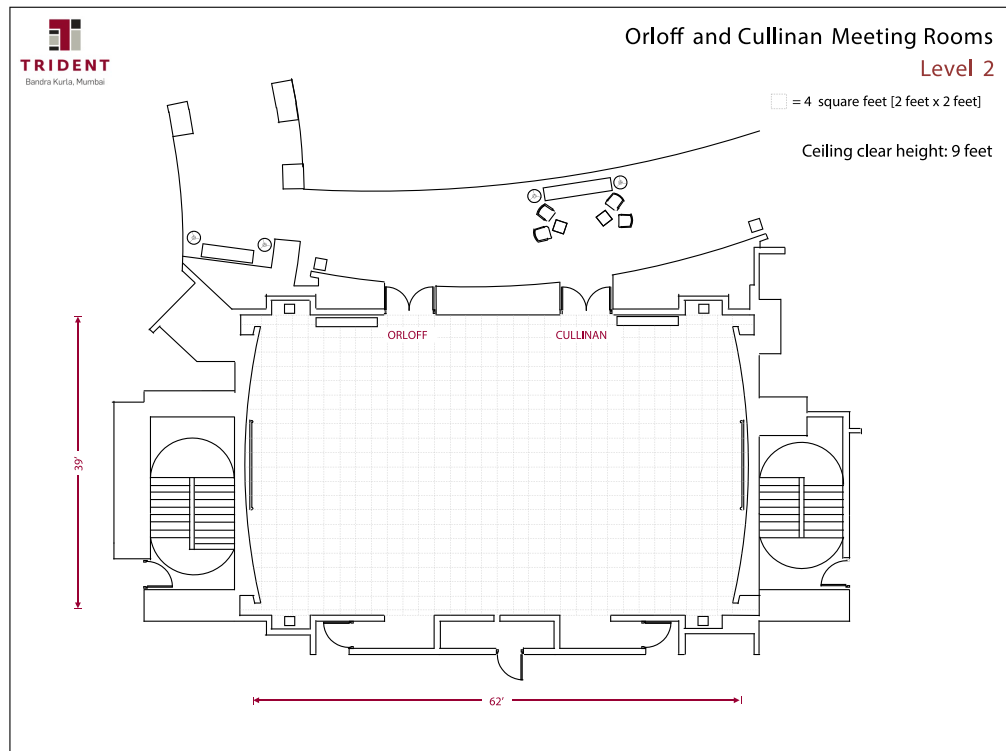
Moving forward, in order to reduce our environmental impact and deliver the latest colour versions of speaker presentations made throughout the conference, we now present them online.

Shortly after the conference you will receive an email with a special URL that will give you access to our feedback form as well as presentations.

For further information please contact:

Neha Kaira
Membership Manager
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FLOOR PLAN



ADMINISTRATIVE NOTES



CONTENT

In this folder you will find: administrative notes, programme, delegate list, speaker biographies, partner information and details of forthcoming events.



BADGES

Please wear the name badge handed at registration at all times.



MOBILE PHONES

Please ensure your mobile phone is switched to silent at all times during presentations.



FEEDBACK FORM

There is a feedback form enclosed in the front of this workbook. We very much welcome and appreciate your feedback about the conference. Your comments will be helpful to us in planning future events.



THE CONFERENCE VENUE

The main conference will be held in the Cullinan & Orloff Hall



CLOAKROOM

In order to deposit bags please ask at the conference registration desk.



PROMOTIONAL MATERIAL

Distribution of promotional materials at the conference is not permitted without the consent of the organisers.



COFFEE BREAKS

Coffee breaks will take place in Cullinan & Orloff Pre-Function Area.



COPYRIGHT NOTICE

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LUNCH

Lunch will be held in Cullinan & Orloff Hall on both days



REGISTRATION DESK AND ASSISTANCE

The registration desk will be located at Cullinan & Orloff Pre-Function Area. It will be attended by the conference management team throughout the event. Should you require assistance, please contact any member of the team who will be happy to help you in any way they can.



MESSAGES AND DELIVERIES

Any messages and/or faxes received will be delivered to the conference management team at the registration desk. If you are expecting a delivery please ensure it is clearly addressed c/o Campden Family Connect stating the date of the meeting and delivered to the venue address (listed under Venue in these notes).



PROGRAMME

Conference timings are indicated in the programme – any changes to these will be announced by the conference chairmen. All sessions have time set aside for questions and discussion. In this way we hope as many delegates as possible can participate in the conference proceedings.



VENUE

Cullinan & Orloff Hall
Trident, Bandra Kurla, Mumbai
C-56, G block, Bandra Kurla Complex,
Mumbai 4000051, India

CONFERENCE PROGRAMME • DAY 1

**Tuesday,
29 November, 2016**

- 09.15 – 10.00 REGISTRATION AND REFRESHMENTS
- 10.00 – 10.05 CHAIRMAN'S OPENING REMARKS
Yogi Dewan • CEO & Founding Partner, Hassium Asset Management, UK
- 10.05 – 10.20 **INTRO: CLASSICAL STRUCTURE OF FAMILY OFFICE GOVERNANCE – AN INSIGHT**
• Challenges facing family business
• How family governance can help
• Benefit of setting up a governance framework
• The role of the Family Office in ensuring success of the governance for the family.
Yogi Dewan • CEO & Founding Partner, Hassium Asset Management, UK
- 10.20 – 10.35 **FAMILY BUSINESS – BUILD TO LAST**
Family businesses are a major contributor to the GDP, and key generators of employment. At the same time, it is also observed that not more than 30% of the family businesses make it to the 2nd generation and only 12% make it to the 3rd. For sustaining the family business across generations, a robust succession planning is key. With this background, the session would cover:
- Imperatives for robust succession planning
- Key considerations /steps involved
- Key drivers involved in succession planning
- Key regulations to be manoeuvred through while doing succession planning
Pranav Sayta • Tax Partner and Family Business Services Leader, EY, India
- 10.35 – 11.10 **PANEL: INDIAN HYBRID FAMILY OFFICE: A CONVERGENCE OF KNOWLEDGE AND SKILLS**
Indian economy is at an early stage of the Family Office market. Due to cultural issues that have a strong impact on the demand for Family Office solutions we see Hybrid Family Office Network Model emerge. The composition of this hybrid network structure is flexible and dynamic and is often managed by some sort of agent who is either a family member or a trusted advisor to the family. This panel will discuss different configurations of hybrid Indian Family Offices:
• A Family Office network that is led by the current or previous CFO of the family business.
• A Family Office model that is mainly dominated by global (private) banks.
• A Family Office network that is guided by independent advisors and /or lawyers.
• A Family Office model that is led by external asset managers.
• A formalized and well-structured Single Family Office model
Amitabh Chakraborty • MD & CIO, Kitara Capital, India
Jai Rupani • CIO, Dinesh Hinduja Family Office, India
Pranav Sayta • Tax Partner and Family Business Services Leader, EY, India
Rakesh Chand • Chairman, Kaura Foundation, Switzerland
Moderator: **Dinesh Vaswani** • Founder & MD, Acuitas Capital Advisors, India
- 11.10 – 11.45 **THE TRANSITION FROM FAMILY BUSINESS TO FAMILY OFFICE & BEYOND**
This case study will explore the evolution of the Clark's family business, with over £1.5bn in revenues in 2015, to the Family Office and beyond. We will view the rich heritage of the family's shoemaking history and how they have evolved to the Family Office. The journey from family business to family office, why where the offices set-up, the purpose and structure, how has the family managed the challenges, what lessons have been learnt and what lies ahead for 7th generation family member and entrepreneur, Galahad Clark.
Galahad Clark • Founder, Vivobarefoot, UK
- 11.45 – 12.00 MORNING NETWORKING AND REFRESHMENT
- 12.00 – 12.35 **INTERVIEW: THE JOURNEY OF DISCOVERY – ESTABLISHING A FAMILY OFFICE**
Following the successful sales of a respected Billion Dollar IT Business in the United States, the Trivedi family will share their 'Journey of Discovery' on the creation of the family office. What were the determining factors, the different choices and structures explored, what have been the benefits and challenges and the roles of the NxG in the development and management of the office.
Shivani Trivedi • Board Member, Trivedi Family Office, USA
Ashok Trivedi • Managing Partner, Trivedi Family Office, USA
Interviewer: **Dominic Samuelson** • CEO, Campden Wealth, UK

CONFERENCE PROGRAMME • DAY 1

- 12.35 – 13.15** **PANEL: PORTFOLIO BUILDING FOR FAMILY OFFICES**
Asset allocation is one of the most important decisions a family will make. Personalized and specific to the family's and individual's situation, age, goals, risk appetite and preferences, there is no one-size-fits-all. In environment where each selection represents a high stake decision, what are the long-term prospects of traditional and non-traditional assets and how can family offices gain strong risk adjusted returns across their portfolio?
Hriday Mittal • *Chairman's Office*, RPG Enterprises, India
Rajat Mehta • *Director*, Mehta Group, India
Rohinton Bharucha • *CEO & President*, Patni Financial Advisors, India
Moderator: Sameer Mehta • *Director*, Atlas Family Office, India
- 13.15 – 14.20** NETWORKING LUNCH
- 14.20 – 15.00** **PRESENTATION: CAPITAL PRESERVATION IN AN ERA OF CENTRAL BANK FOLLIES**
Central Banks have had only one strategy since 1995 but especially since 2000, in dealing with the consequences of previous financial market "bubbles". Low interest rates are now being directed even lower by increasing Central Bank balance sheets and increasingly towards negative rates. These actions will have severe unintended consequences and the reach for yield engendered by these policies could ultimately inflict severe losses on investors. We discuss how investors could construct portfolios to preserve capital in an era of Central Bank follies.
Prashant Trivedi • *Chairman*, Multi-Act Trade & Investments, India
- 15.00 – 15.45** **PANEL: LAW FIRMS - FAMILY DOCTORS FOR FAMILY OFFICES**
Be it advising on and creating structures for holding assets or protecting assets, to succession planning, to governance matters including family charters and constitutions, or assisting on dispute resolution, a law firm does it all. Investments and acquisitions by family offices or creation of personal assets, whether in securities or real estate, a law firm is a one stop shop for the family. It is important for families to have a trusted advisor in a law firm to work closely with their family offices to secure the family and its assets.
Harshbeena Zaveri • *Vice Chairman & MD*, NRB Bearings Ltd, India
Juzar Khorakiwala • *Chairman & MD*, Biostadt India Limited, India
Moderator: Zia Mody • *Partner*, AZB & Partners, India
- 15.45 – 16.00** AFTERNOON NETWORKING AND REFRESHMENTS
- 16.00 – 16.50** **KEYNOTE: PROFESSIONALISING A FAMILY MANAGED BUSINESS**
When growing a family business, family business owners often find themselves at a crossroads – on one hand, there's the wish to keep things 'in the family', and on the other, there are outside business coaches and consultants urging them to 'professionalize'. This case study will explore the professionalization of one the most successful family managed business – Marico Limited. The journey of how this family managed business has been professionalized, their successful product innovations, internationalizing the business, inducting non family executives in key roles, challenges faced and lessons learnt and the road ahead for the company.
Harsh Mariwala • *Chairman*, Marico Limited, India
- 16.50 – 17.35** **PANEL: CATALYZING WEALTH FOR CHANGE**
In the present landscape, business families have increasingly accepted a tri-fold bottom line of growth that includes community and environment. What is noteworthy is that the fundamental premise of philanthropy – its motto of service – continues as before. With business families in India contributing largely towards social development, it is essential that we look at the strategies, processes and resource allocation for the activities undertaken by the families through the organized and strategic philanthropic initiatives of businesses, family foundations or family offices.
• Diverse choices for family offices
• Empowering the financing of philanthropic investments
• Choosing and managing investments into social impact opportunities across the complete spectrum
• Challenges faced and the long term view point
Amit Patni • *Director*, Raay Global Investments, India
Shloka Mehta • *Director*, Rosy Blue Foundation, India
Sonakshi Agarwala • *Trustee*, Sterlite Foundation, India
Zarina Screwvala • *Founder & Managing Trustee*, Swades Foundation, India
Moderator: Emily R Menon • *Founder & Executive Director*, Innovaid, India
- 17.35 – 18.00** CHAIRMAN'S CLOSING REMARKS FOR DAY ONE
- 18.00 – 19.30** COCKTAIL RECEPTION
All conference participants are warmly invited to join us for a networking cocktail reception, held at Colosseum, Trident Bandra Kurla

CONFERENCE PROGRAMME • DAY 2

**Wednesday,
30 November, 2016**

- 09.30 – 10.00 REGISTRATION AND REFRESHMENTS
- 10.00 – 10.05 CHAIRMAN'S OPENING REMARKS FOR DAY TWO
- 10.05 – 10.45 **PANEL: EMERGING MARKETS – CHARACTERISTICS AND OPPORTUNITIES**
Family Offices are constantly looking at new opportunities and sectors to invest in. The challenge is to identify the new sectors in time and choosing the right vehicle of instrument for the same. The panel will discuss the characteristics of some of the emerging sectors such as FinTech, MedTech, Block Chain Technology and preferred instruments of investment for the same.
Deepak Natraj • *Managing Director*, Aarin Capital, India
Manoj Maheshwari • *Chairman*, Maheshwari Investors, India
Shweta Agarwal • *Trustee*, Sterlite Tech Foundation, India
Moderator: Ajeet Khurana • VC Advisor and Investor, India
- 10.45 – 11.15 **PRESENTATION: NAVIGATING MARKET VOLATILITY IN AN UNCERTAIN GLOBAL ECONOMIC ENVIRONMENT**
Low interest rates and significant QE have not lifted growth rates in many large economies. Currency volatility has increased in the past year. Against such a backdrop, what is the outlook for emerging markets in general and the Indian economy, in particular?
S Naganath • *President & CIO*, DSP BlackRock Investment Managers, India
- 11.15 – 11.45 MORNING NETWORKING AND REFRESHMENTS
- 11.45 – 12.15 **KEY NOTE: DISRUPTING BUSINESS GLOBALLY- HOW SHOULD A FAMILY OFFICE FACE THIS DISRUPTION**
Technology innovation is disrupting business globally in a manner not seen before. Industry 4.0, Robotics, AI and ML, digitization, 3D printing, autonomous cars, alternative energy etc. are changing the paradigm unleashing new forces and severally impacting established value. Machines with intelligence and self-learning which are trainable are impacting jobs creating adverse social impact. The move to the right globally and the increasing anti-globalization rhetoric will further impact business. In this era of disruption family business needs to understand the change and develop appropriate strategies for survival and growth.
Mohandas Pai • *Chairman*, Manipal Global Education, India
- 12.15 – 12.45 **GLOBAL FAMILY OFFICE REPORT 2016: TRENDS AND ANALYSIS**
Campden Wealth's annual Global Family Office Report, partnered by UBS, is one of the most in-depth and insightful analyses of family offices, their investments, structures and purpose available in the world today. This session will dive into the themes, data and statistics enabling you to gauge performance against the industry standard.
Dominic Samuelson • *CEO*, Campden Wealth, UK
- 12.45 – 13.00 CHAIRMAN'S CLOSING REMARKS FOR THE CONFERENCE

CONFERENCE PROGRAMME • DAY 2

13.00 – 14.00 NETWORKING LUNCH

14.00 – 16.00 **THE FAMILY OFFICE THINK TANK MARKET OVERVIEW: THE GLOBAL ECONOMIC IMPACT ON REGIONAL DECISION MAKING**

1. Closed-door discussions for family principals

Examining the evolving geopolitical and global socio-economic dynamics and how it will impact future decisions over the next 6-12 months

2. Closed-door discussions for family office executives & advisors

Reviewing the market landscape over the past 6-12 months and how it has affected family office decisions

During the closed-door sessions, you will have the opportunity to meet and find out more about the family principals, family office executives and major family investors with whom you will be spending time with over the conference – optimising the number of meaningful connections you will make while setting the scene and context of the key discussions which follow.

*Moderator: **Yogi Dewan** • CEO & Founding Partner, Hassium Asset Management, UK*

16.00 CLOSE OF CONFERENCE

MAIN PARTNER



Multi-Act was founded in 1997 by two Wharton graduates, to develop an Equity Research capability for their own family's investments. After having managed proprietary investments successfully for 12 years, Multi-Act ventured into providing equity advisory services to select outside investors in 2009.

Today Multi-Act has evolved into an independent International Research and Investment House catering to UHNIs, Large Business Families, Investment Managers and Intermediaries around the globe. Our Research and Quant team comprises of 30 Investment Professionals most of whom are Chartered Accountants with many CFA charter holders.

Multi-Act has been designed to help families address the three major issues that we believe families face while preserving and growing their wealth on an inflation adjusted basis:

- I) Structuring a balanced portfolio that will preserve capital in the challenging and adverse macro- environment brought about by unconventional Central Bank policies.
- II) Adhering to investment strategies that are focused on long term investment goals and objectives without being behaviourally swayed by a short term performance derby.
- III) Developing deep relationships with intermediaries who exhibit a fiduciary mind-set rather than intermediaries with an "agent" mentality. Multi-Act's basic premise is that it is as much a fiduciaries responsibility as that of investor families, in educating investors sufficiently of the myriad investment risks in the portfolio.

Our larger mission is to have a lasting impact on the capital markets ecosystem in which we operate. We have endeavoured to rigorously and systematically capture our investment insights over the last 18 years into what we believe are unique product and service offerings in the service of investors. We believe they are structured to help overcome the obvious and glaring gaps and challenges faced by Investors and Investment Professionals alike.

Prashant K Trivedi, *Chairman*, of 'Multi-Act Trade and Investments Private Ltd' and 'The Indian Card Clothing Company Ltd'.

Mr. Prashant K Trivedi, CFA holds a B.Sc. (Econ.) from The Wharton School (W82). He worked with SG Warburg & Co (1983 to 1991) in Japan, UK and Singapore. Presently he is the CEO & CIO of his family office. Prashant is a strong believer in the Austrian School of Economics and has been responsible for constructing portfolios invested in global equities, global fixed income, and real estate for the family office based on a multi-disciplinary framework. He credits this framework in protecting the family office's investors from the market crashes in 2000-2002 and 2008-9. He founded Multi-Act in 1997 with a goal to develop an independent center of excellence in equity research and investments, keeping in mind the flaws & challenges he saw in the advisory eco-system. Today, Multi-Act is engaged in Independent investment research, and provides Advisory and Portfolio Management Services. It employs 50 people (30 research professionals) and operates from Mumbai and Pune.

Mr. Trivedi will be talking about Capital Preservation in the era of Central Bank Follies on Tuesday afternoon. We look forward to meeting you during the course of this conference.

For further information please contact:

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PROFESSIONAL PARTNER



AZB & PARTNERS
ADVOCATES & SOLICITORS

AZB & Partners is one of the prominent law firms in India. Our aim is to provide clear, concise and practical advice based on an in-depth knowledge of the legal, regulatory and commercial environment within which our clients operate and a full understanding of their overall business objectives. We have 8 offices across Mumbai, Delhi, Bangalore and Pune, with a total strength of approximately 370 lawyers.

Our core values embrace operating to the highest professional standards and building supportive and strong relationships with clients. These values are communicated throughout the firm and serve to instil in all our lawyers, a full appreciation of the professional and ethical responsibilities the firm places upon them.

Our clients are central to everything we do. Their needs determine how we organise ourselves and the range of specialised services we provide. We aim to work in partnerships with clients to anticipate and deal successfully with the legal and regulatory aspects of their business aims and objectives.

Our lawyers are members of broad practice areas which work together closely. These practice areas are structured to facilitate the sharing of technical know-how and the development of a consistently high standard of legal advice across the firm.

The legal services rendered by us cover the corporate, commercial, regulatory, financial and tax planning aspects of modern businesses. We have been involved in advising in the field of mergers, acquisitions, joint ventures and general corporate, regulatory practice and securities laws, private equity, capital markets, funds practice, banking and finance, compliance & investigation, anti-corruption, anti bribery, anti money laundering and corporate governance, microfinance, derivatives, infrastructure and project finance, real estate, media and entertainment, information technology and business process outsourcing, employment, insurance, intellectual property, pharmaceuticals and biotechnology, taxation, aviation, competition law, and litigation and arbitration.

Zia Mody, *Founder & Senior Partner*, AZB & Partners

Mrs. Mody is the Founder and Senior Partner of AZB & Partners and one of India's foremost corporate attorneys. She is non-executive director of the HSBC Asia Pacific Board, a member of the World Bank Administrative Tribunal, Washington D.C. (2008-2013), and a Vice President and Member of the London Court of International Arbitration (2010-2013). Awarded the "India Managing Partner of the Year – 2016" by Asian Legal Business (Thomson Reuters), Mrs. Mody is listed by Forbes and Fortune India (2013, 2014, 2015 & 2016) as one of 'India's 10 most Powerful women'; and is also listed by Forbes Asia as one of 'Asia's 50 Power Businesswomen' (2015). She was the vice president of the London Court of International Arbitration (2009–13).

Mrs. Mody will be talking on Law Firms – Family Doctors for Family Firms on Wednesday afternoon. We look forward to meeting you during the course of this conference.

For further information please contact:

Zia Mody
Founder & Senior Partner
AZB & Partners

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PROFESSIONAL PARTNER

DSP BLACKROCK MUTUAL FUND

DSP BlackRock is a joint venture between the 150 year old Indian financial firm, DSP Group and the world's largest asset manager, BlackRock. We are one of the premier asset management companies in India, with over 19 years of distinguished track record of investment excellence. As on June 30, 2016, we manage assets worth over INR 44,600 crore. The DSP BlackRock team in India is well connected and supported by BlackRock's global teams that support our investment managers across asset classes, styles and markets with an additional focus on robust risk-management controls and processes designed to understand, evaluate and mitigate risks.

The DSP Group, headed by Mr. Hemendra Kothari, is one of the oldest financial services firms in India with a track record of close to 150 years. The DSP Group commenced their stock broking business in the 1860s and the family behind the group has been very influential in the growth and professionalization of capital markets and the money management business in India. BlackRock is the largest asset management company in the world, managing assets worth USD 4.89 trillion (as at June 30, 2016). The firm employs more than 12,000 professionals across 70 offices in 30 countries. With over 135 investment teams around the world, BlackRock manages over 7,700 product portfolios.

S. Naganath, *President and CIO*, DSP BlackRock Investment Managers Pvt. Ltd
Mr. Naganath is the President and Chief Investment Officer of DSP BlackRock Investment Managers Pvt. Ltd. He worked with DSP BlackRock Investment Managers Pvt. Ltd. (previously called DSP Merrill Lynch Fund Managers) from its inception (1996) to October 1999 as Chief Investment Officer. He then worked for Credit Suisse Asset Management, New York as a portfolio manager for international equities before re-joining DSP BlackRock Investment Managers Pvt. Ltd. in 2002 as Joint President and Chief Investment Officer. Prior to his initial position at DSP BlackRock Investment Managers, he had worked in Hong Kong as a portfolio manager with Merrill Lynch Asset Management and GT Management, Hong Kong.

Mr. S. Naganath will be talking about Navigating Market Volatility in an Uncertain Global Economic Environment on Wednesday afternoon. We look forward to meeting you during the course of this conference.

For further information please contact:

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PROFESSIONAL PARTNER



EY is a global leader in its Assurance, Tax, Transaction and Advisory services. The insights and the quality services we deliver help to build trust and confidence in capital markets and in economies the world over. We develop outstanding leaders who team to deliver on our promises to all of our stakeholders. In doing so, we play a critical role in building a better working world for our people, for our clients and for our communities.

In India, EY has its offices in eleven cities including Ahmedabad, Bengaluru, Chandigarh, Chennai, Hyderabad, Jamshedpur, Kochi, Kolkata, Mumbai, Delhi NCR, and Pune. The organisation has been ranked as the # 1 professional services brand in India for the third time in a row in the Global Brand Survey 2015 (Kantar), 2013 (TNS) and 2011 (TNS). It has also been ranked as a tier one tax firm by the Euromoney International Tax Review – World Tax Guide for 13 consecutive years, the #1 Financial Advisor by Bloomberg for 14 consecutive years for most number of deals from 2002-2014, and a ‘Dream Employer’ by the World HRD Congress in 2014.

EY refers to the global organization and may also denote one or more of the member firms of EY Global Limited, each of which is a separate legal entity. EY Global Limited, a UK company, which is limited by guarantees, does not provide services to clients. For more information on our organization, please visit ey.com.

About EY’s Family Business Services

EY is a market leader in advising and guiding family businesses. With almost a century of experience supporting the world’s most entrepreneurial and innovative companies, we understand the unique challenges they face — and how to address them. We offer a personalized range of services aimed at the specific needs of each individual business — helping it to grow and succeed for generations. Our Family Business Global Center of Excellence is a powerful resource that provides access to our knowledge, insights and experience, connecting family business owners to their peers through the strength of our global network.

Pranav Sayta, Tax Partner and Family Business Services Leader, EY India

Mr. Sayta specializes in advising large Indian and multinational corporates on international tax matters, transactions structuring, wealth succession planning, mergers and acquisitions. A gold-medallist chartered accountant attaining first rank at all-India level, he has also been consistently rated as one of the leading tax advisors in India by international tax review and by the legal media group guide. Mr. Sayta regularly addresses seminars on tax, regulatory developments and family business aspects.

Mr. Sayta will be talking about Family Business- Built to Last on Tuesday morning. We look forward to meeting you during the course of this conference.

For further information please contact:

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Services Leader, EY India

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SPEAKER BIOGRAPHIES

Ajeet Khurana

VC Advisor & Investor,
India

Mr. Khurana wears many hats: author, angel investor, mentor, TEDx speaker, steering committee of the NASSCOM Start-Up Warehouse, ex-advisor to Kalaari Capital, and former CEO of IIT Bombay's business incubator, among others. Recently he was also part of the team that created the TV show, "The Vault." Before all this, he was entrepreneurial twice in the field of education and web publishing. As a lecturer at the University of Texas at Austin, he taught ecommerce back in 1993, when the term "ecommerce" had not yet been coined. An undergrad in computer engineering from the University of Mumbai, and an MBA from the University of Texas at Austin, Mr. Khurana is presently a leading name in the startup ecosystem. From starting two ventures as a solopreneur, to helping a large number of startups with their go-to-market, he has never shied from getting his hands dirty. At the same time he has helped dozens of startups raise investment.

Amit Patni

Director,
RAAY Global
Investments,
India

Mr. Patni has more than 25 years of experience in computer hardware and components market in India and abroad. He was a promoter shareholder of Patni Computers and former Director of PCS Technology Ltd. (pioneer in Indian ITES). The promoter family sold its stake in Patni Computers in May 2011 to iGate Corporation at value of \$1.5 billion. Currently he is Founder & Director of RAAY Global Investments (Family Office), Director at Raay Foundation, Co-founder & Chairman at Nirvana Venture Advisors (40 Million USD Digital & Internet Venture Fund), Co-founder and Partner in Elysium Investment Advisors Hedge Fund) and Co-Founder and Partner in The Hive-India (A Big Data incubator), Director and Investor in Waterfield Advisors (Wealth Management and Multifamily advisor). Mr. Patni established Raay Foundation (the philanthropic arm of Amit Patni Group) in order to structure and formalize his family philanthropy and adopt causes close to his and his wife, Ms. Ruchi Patni.

Amitabh Chakraborty

MD & CIO,
Kitara Capital,
India

Mr. Chakraborty is responsible for the firm's investments across geographies. Kitara Capital is backed by large family offices, primarily from the Middle East, including in Oman and UAE and so far has invested ~USD140mn in equities in both private and public markets in India and Middle East. He has over 30 years of work experience, including over 22 years in the financial services industry. Prior to joining Kitara Capital, Mr. Chakraborty was the President (Equity) in Religare. In the past, he has worked in Brics Securities as the Business Head; Kotak Securities as the head of Private Client Research; IDBI Capital Markets as the head of institutional equity business; Cazenove & Co, London, as the Director and Head of Research for India operations; A.F. Ferguson & Co as a Management Consultant; and in Gas Authority of India.

Ashok Trivedi

Managing Partner,
Trivedi Family Office
(administered by
SWAT Capital),
USA

As Managing Partner of SWAT Capital, Mr. Trivedi is responsible for managing investments for the Trivedi Family Office, which includes the Trivedi Family Foundation and The Trivedi Family Charitable Trust. Formerly, Mr. Trivedi was the Co-Founder and Co-Chairman of over \$1.3 billion revenue iGate Corporation (NASDAQ: IGTE) a global leader who pioneered outcome based pricing model using iTOPS (integrated technology and operations-based solutions). His vision guided the development and execution of iGATE's worldwide strategy. In July 2015 iGATE was acquired by CapGemini for approximately \$5 Billion enterprise value. In addition to iGate, Mr. Trivedi is the Co-Founder and Co-Chairman of Mastech Corporation, a provider of high-value information technology services and solutions in the U.S. Also, he has led the launch of over 10 new IT services businesses in emerging technologies, and has been an angel investor in over 45 early state technology and financial service businesses including Edelweiss Capital, Cvent & CBay.

Deepak Natraj

Managing Director,
Aarin Capital,
India

Mr. Natraj manages Aarin Capital which has made several large & mid-size, and seed investments. Aarin is a proprietary fund co-founded by Dr Ranjan Pai and Mohandas Pai. Mr. Natraj has set up the fund and has been with it since. Aarin's investments include focused molecular research, implantable & external medical devices, mobile-medicine, gene testing, test-prep, software products, eCommerce and tablet based platform learning in India & overseas, travel and consumer facing businesses. Mr. Natraj has also ideated, structured, set-up & raised capital for several of the funds anchored by Aarin and for co-investments. He is on the board and investment committees of some of the investee companies and funds. From early 2008 to early 2010, Mr. Natraj was CFO at a Sequoia funded tech start-up, later sold to a leading mid-tier Indian outsourcer. Since mid-2000 he headed strategic initiatives at Infosys and was its first Chief Risk Officer. He deployed over US\$100m in various initiatives, including cross-border acquisitions and the incubation of the in-house consulting business.

SPEAKER BIOGRAPHIES

Dinesh Vaswani

Founder & Managing Director,
Acuitas Capital Advisors,
India

Acuitas Capital Advisors, a multi-family investment office that advises families on their investments. Mr. Vaswani has over thirty years' experience both investing in and operating companies in India and the U.S. Mr. Vaswani was a Managing Director at Temasek Holdings, where he led investments in companies across a range of industries. He also established Bessemer Venture Partners' operations in India. His operating experience includes as a start-up entrepreneur in Silicon Valley, as the CEO of Blue Star Infotech's US operations and as a consultant with Andersen Consulting (now Accenture). He has served on a number of boards of companies including Blue Star, Firstsource, Mindtree, Venture Infotech and Borosil. He is a former Chair of the Bombay Chapter of the Young Presidents Organization, a founding board member of the US-India Venture Capital Association and was a TiE Silicon Valley Charter Member.

Dominic Samuelson

Chief Executive Officer,
Campden Wealth,
UK

Mr. Samuelson is CEO of Campden Wealth which he joined back in 2006. Campden Wealth is the leading independent provider of information, education and networking for generational family business owners and family offices globally in person, in print, via research and online. Campden further enhanced its international reach and community with the acquisition of the Institute for Private Investors (IPI), the leading membership network of private investors in the United States, founded in 1991 and with the establishment of Campden Family Connect Pvt. Ltd- a joint venture with the Patni Family in Mumbai, India in 2015. Previously, he was Director, Corporate Development at The Wall Street Journal Europe and Founder & Managing Director, Dow Jones Conferences for Dow Jones & Co. He has also served as Communications & Events Director at Business Seminars International.

Emily Menon

Founder & Executive Director,
Innovaid Advisory Services,
India

Ms. Menon has spent the last 9 years pioneering Philanthropy and CSR advisory services in India. She has personally advised many public figures, including Shah Rukh Khan, Priyanka Chopra, Sachin Tendulkar, Steve Waugh, the Prince of Udaipur, and HNI Families and their businesses, on their Philanthropy and CSR in India. Originally from Australia, in 2011 Ms. Menon was selected as one of Advance's 50 Current and Emerging Female Leaders in Australia and in 2012 was shortlisted as the 'Global Australian of the Year' in the Social Innovation category. Additionally she was the first woman Chair of the Australia & New Zealand Business Association in India from 2012 - 2016 and is the official Charity Advisor to the hit National Geographic television series 'Wheel2Wheel - Season 2 (India).'

Galahad Clark

Founder,
Vivobarefoot,
UK

Mr. Clark's unique heritage meant growing up immersed in a world that honored tradition and pushed boundaries of design innovation. As a teenager, he spent summer holidays on he was offered a Morehead Scholarship at the University of North Carolina, where he earned a degree with honors in Chinese and Anthropology. While there he founded 'Students 4 Students International', an organization created to help disadvantaged students in Africa go to the best secondary schools and onto university. There are now three such projects thriving around the world. His degree led him to Taiwan and China, where he studied the language and researched technical shoe production and, when back in the US, he designed and developed 'Wu-Shoes' for hip-hop trailblazers, Wu Tang Clan. In 2003, Mr. Clark took over Terra Plana and set about transforming the brand by introducing new concepts. From the base of Terra Plana he launched United Nude, Worn Again and Vivobarefoot. As of 2012 he focuses on Vivobarefoot and continues to serve on the board of United Nude, Worn Again and the Crossway Foundation.

Harsh Mariwala

Chairman,
Marico Limited,
India

Mr. Mariwala leads Marico Limited as its Chairman. He is also Chairman & Managing Director of Kaya Limited. Over the past three decades, Mr. Mariwala has transformed traditional commodities driven business into a leading consumer products and services company in the Beauty and Wellness space. Mr. Mariwala's entrepreneurial drive and passion for innovation, enthused him to establish the Marico Innovation Foundation in 2003. The Foundation acts as a catalyst to fuel innovation in India. Mr. Mariwala started ASCENT in 2012, a not-for-profit expression of his passion to create a unique trust based peer-to-peer platform for high potential growth-stage entrepreneurs that leverages the "power of the collective" and enables them to share and exchange experiences, ideas, insights and create a healthy ecosystem to learn from each other and grow their enterprise. Mr. Mariwala was the President of Federation of Indian Chambers of Commerce and Industry (FICCI) in 2011.

SPEAKER BIOGRAPHIES

Harshbeena Zaveri

Vice Chairman & Managing Director
NRB Bearings Limited,
India

Ms. Zaveri is Vice Chairman & Managing Director of NRB Bearings Limited. She graduated as a Wellesley Scholar with honors in Urban Studies and Anthropology from Wellesley College. Ms. Zaveri spearheaded NRB's foray into Design Engineering and R&D which enabled NRB to become a supplier to the world's foremost automotive companies such as Daimler, Getrag, ZF and Volvo globally. She is currently Chairperson of the Board of SNL Bearings Limited and an independent director of Karamchand Thapar & Bros (Coal Sales) Ltd. Fortune Magazine ranked her amongst the 17 most powerful Indian businesswomen from 2011 through 2015. India Today ranked her among the 25 Most Influential Women Professionals in 2012. Under her leadership, in 2008 NRB Bearings Limited was selected by Forbes Magazine as one of Asia's Best 200 companies under US \$ 1 Billion.

Hriday Mittal

Chairman's Office,
RPG Enterprises,
India

Mr. Mittal works with Mr. Harsh Goenka, Chairman – RPG Enterprises, a \$3 Billion revenue 'Tyres to Technology' conglomerate. In his current role, he monitors the performance of the RPG Group companies and assists in formulation of the growth strategy and M&A decisions of the Group. Mr. Mittal handles the Family office investment portfolio, advising on investments across asset classes including Equity, Fixed Income and Real Estate. In his earlier engagements, he has been a Partner in a mid-sized Consulting firm and worked with the corporate team of Essar Group. Mr. Mittal brings with him close to 10 years of experience advising corporate houses on their business decisions. He is an MBA from ISB Hyderabad and a Chartered Accountant from the Institute of Chartered Accountants of India. He is also a qualified CFA from the CFA Institute, USA and an alumnus of Narsee Monjee College, Mumbai.

Jai Rupani

Chief Investment Officer,
Dinesh Hinduja
Family Office,
India

As the CIO of the Dinesh Hinduja Family Office, Mr. Rupani oversees investments across all asset classes for the group: real estate, stocks, bonds, structured products, private equity and venture capital. He also has primary responsibility for Gokaldas Lifestyle, a real estate development company focused on luxury projects. Prior to joining the Gokaldas Group, Mr. Rupani was part of the investment team at India Value Fund, a USD 1.8 Billion private equity fund in Mumbai. During his professional career, Mr. Rupani has lived and worked across the globe and has spent several years with The Royal Bank of Canada Capital Markets Group as an investment banker in their San Francisco office. He has completed his formal education in Finance and Real Estate at the University of Michigan, Ann Arbor and the University of Texas at Austin in the United States. In his free time he enjoys mentoring start-ups, playing golf and spending time with his family.

Juzar Khorakiwala

Chairman & MD,
Biostadt India Limited,
India

Mr. Khorakiwala established Biostadt India Ltd in the year 2002 and over the last decade it has diversified into 7 operating verticals - Cropcare Division : Distributes in-house brands of Biofertilizer and Crop Protection Chemicals; Aquaculture Division : Products for Shrimp Industry; Nandi-Hi-Q Seeds : Production of Hybrid seeds for the farming community; Contract Manufacturing for large multinationals, like Syngenta and Cheminova.; International business covering exports to 15 countries; Vinthinh-Biostadt : Joint venture in Vietnam as a diversified organization dealing in Aquaculture products and hatchery business; Biostadt Phillipines Inc : A fully owned subsidiary involved in manufacturing and marketing of crop care products. Biostadt India Ltd. is headquartered at Worli, Mumbai and employs over 1000 people in India and outside with 2 manufacturing facilities in Bhavnagar and Jammu, an R&D Center in Aurangabad, and R&D fields in Ahmedabad. Mr. Khorakiwala is also the Chairman of Akbarally's for Men, and currently the President of the Indo-Vietnam Chamber of Commerce.

Manoj Maheshwari

Chairman,
Maheshwari Investors,
India

Maheshwari Investors is a Non Banking Financial Services company with interests spanning Real Estate, Capital Markets and Private Equity Investing. A third generation industrialist, Mr. Maheshwari has been a serial entrepreneur with over three decades of experience in running successful businesses in the Pharmaceuticals and Information Technology industries through family companies - Geoffrey Manners, Wyeth Lederle, and the Aurovision group of companies. He serves as a Director on the Boards of Metro Shoes, Mahindra Gears, Mahindra CIE Automotive, Bilforge, RPG Life Sciences, Ador Welding, Hamilton & Co and also advises several family offices. Mr. Maheshwari is one of the founding members of Mumbai Angels and an early pioneer of startup investing in India. He has backed several marquee early stage companies such as Inmobi, Apalya and Fractal Analytics amongst several others. His passion is consulting, incubating and mentoring new disruptive businesses and ideas.

SPEAKER BIOGRAPHIES

Mohandas Pai

Chairperson,
Manipal Global
Education Services,
India

Mr. Pai is the Chairperson of Manipal Global Education Services Pvt Ltd. He co-founded AARIN Capital and 10 other venture funds to fund companies in Technology, Ecommerce, Health Care and Life Science. He was awarded Padma Shri by the President of India in 2015 and Karnataka Rojyotsava Award in 2004. He had served on the Board of SEBI and is currently the Chairman of SEBI Primary Markets Advisory Committee. He is now on the Board of NSE and Havells India Limited. Mr. Pai joined Infosys in 1994 and was elevated to a Member of the Board in 2000. He was Infosys's CFO from 1994 to 2006. In 2006, he voluntarily relinquished the role to lead Human Resources and Education & Research. Mr. Pai stepped out of Infosys to pursue his other long-standing passion - higher education for human development in June 2011. In 2000, he along with certain other philanthropists set up the Akshaya Patra Foundation, Bangalore - a mid-day meal program for school going children.

Rajat Mehta

Director,
Mehta Group,
India

Mr. Mehta is successfully spearheading his family business of stock broking, financial services and real estate. He spends most of his time leading the investment banking team at Mehta Group working on deals across sectors like Power, Consumer Durables, Real Estate and Pharma. Mehta Group through its Portfolio Management Service (PMS) manages close to \$ 40 million for its clients in public equities. He is now setting up an NBFC that will focus on SME lending, a space that he thinks need maximum attention by banks & NBFC's, as it is his belief that this sector will add fuel to the nations growth. As passion Mr. Mehta invests, mentor's and raises funds for several domestic start-ups and is advisor to a few venture funds and incubators focusing on technology, sustainable future and shared economy. Few of his successful investment ventures are: Green Cart, Just ride, Hey taxi, Hey didi ,Yantra digital services & Groww.

Rakesh Chand

Chairman,
Kaura Foundation
Switzerland

The Kaura Foundation has its origins going back over 50 years when Mr. Chand's grandmother started an orphanage in the village in India from where the family came from and later a school for the same children. After gaining experience in non-profit work in New York and Zurich, he decided to focus his energies on expanding its presence. It now has projects in Costa Rica, Panama, Colombia, Kenya, Tanzania, South Africa, India, Sri Lanka and Samoa. The focus is health, education and micro financing and after 5 years as its CEO, he now serves as its Non-Executive Chairman. Mr. Chand started his studies in Law. He has worked with UBS in Zurich after which he went to Costa Rica, where he became a volunteer English teacher, developing what is now the Kaura Foundations English Teaching module. He developed projects in Columbia, Panama and Kenya. In 2009 he was hired by Zurich Investment Management as the Business and Communications Manager for the CEO. He worked for him until he became the Group CEO of Zurich Insurance Company. In 2011 he was asked by the Kaura Foundation Board to lead their strategic development and fundraising drive and elected as their CEO.

Rohinton Bharucha

President & CEO,
Patni Financial Advisors,
India

In 1980, Mr. Bharucha was a key person involved in implementing His Majesty's Royal Decree to set up the State General Reserve Fund in the Sultanate of Oman, one among the first dozen odd Sovereign Wealth Funds. This included setting up an asset allocation philosophy, establishing a framework of risk limits (institutional, currency and country bias), and managing assets to meet the Sultanate's country debt profiles in coordination with the Central Bank of Oman. In 2003 he established one of the very early Indian Family Offices for the Patni Family (Patni Computer Services Limited) and has been managing this Family Office for the past thirteen plus years. Mr. Bharucha brings forty years of experience in domestic and global capital markets to the table. Besides buy side expertise across listed markets and alternate assets, he has also spent a couple of years on the sell side establishing a retail stock brokerage for a large institutional Indian brokerage and as a merchant banker. Mr. Bharucha is one of the rare votaries of timing markets.

Sameer Mehta

Director,
Atlas Family Office,
India

Mr Mehta is the Director of Atlas Family Office and Director of Dr Mehta's Hospitals (leading 75+ year old healthcare provider and educator in South India). Mr. Mehta is the founder of Mehta Children's Hospitals, Atlas Advisory (enterprise accelerator), Everonn Medical Education (Health Education JV), India Home Health Care and participates on various national healthcare and education committees. Mr Mehta brings over 2 decades of enterprise leadership, multi-national operating, project management, governance, strategic consulting, investment management and entrepreneurial experience within leading organizations like McKinsey & Company, Shell and Fortune 10 and Family Business companies across multiple sectors (healthcare, education, energy, chemicals, technology and retail) across Asia, Europe, Latin and North America. He was a former venture advisor with TVS Capital and election observer with the OSCE/UN. He is a TIE Charter Member and on the Executive Committee of the Chennai Angels.

Shivani Trivedi

Board Member,
Trivedi Family Office
(administered by Swat
Capital), USA

As a Board Member of the Trivedi Family Office, Ms. Trivedi is involved with voting on investment decisions. Additionally, she is also involved with creating a Next Generation Investment Partnership with her siblings. With the Trivedi Family Charitable Trust, she is actively involved with a project to help spread arts education to under privileged youth in her hometown of Pittsburgh, Pennsylvania. Based in New York City, Ms. Trivedi is a women's apparel Fashion Designer. In the past, she has worked for designers: Elie Tahari and Ralph Rucci. Currently, she is exploring opportunities in sustainable fashion and researching wearable technologies, which are two emerging trends in fashion. Ms. Trivedi holds a Bachelor of Arts from Boston University in Psychology, as well as an, Associates Degree in Fashion Design from Parsons the New School for Design.

SPEAKER BIOGRAPHIES

Shloka Mehta

Director,
Rosy Blue Foundation,
India

Ms. Mehta is the Director of Rosy Blue Foundation. She moved back to work with the foundation in 2014, after graduating with a Masters in Law & Anthropology from London School of Economics, and a B.A. in Anthropology from Princeton University. Keenly focused on education and education policy in India, Ms. Mehta has looked to develop the niche space of mentorship, and works with several mentoring organizations towards the same. In 2015, she co-founded a technology platform, ConnectFor, which seeks to be a bridge between volunteers and NGOs, and looks to encourage individuals to realize the value of their time and skills. ConnectFor currently works with around 90 NGOs in Mumbai across 9 different cause verticals including Education, Advocacy and Animals.

Shweta Agarwal

Trustee,
Sterlite Tech Foundation,
India

Ms. Agarwal is part of the promoter family of the Sterlite-Vedanta Group. In addition to being a Trustee on the Sterlite Tech Foundation Board, she is also the Founder and Director for the Smart Village Division within Sterlite Tech. She has previously worked at the grass root level for three years to create a model village near Aurangabad and has also led the set-up of company's Centre of Excellence facility there. Prior to Sterlite, she has worked at Goldman Sachs (London) as a Technical Specialist for the Special Situations Group, managing corporate investment in distressed assets. Ms. Agarwal has completed her MBA from the prestigious Imperial College in London where she was awarded a scholarship. She has an undergraduate degree in Business and Economics from the University of Warwick. She is passionate about creating an impact in rural India using technology and innovation.

Sonakshi Agarwal

Director,
Sterlite School Tech,
India

Ms. Agarwal is a trustee of Sterlite Tech Foundation, and is the founder of its ed-tech programme called School Tech. Under her leadership the programme has grown from just 25 schools in 2013 to 480 schools in 2016. The programme is the largest virtual classroom programme in India and has been widely recognized for the impact it has made in improving learning levels in government schools. Her longer-term vision is to supplement virtual classrooms along with adaptive self-learning systems, and through these technologies she wants to bridge the acute shortage of high-quality teachers in India. In the next phase Sterlite will roll-out this programme across several states that are covered by National Optical Fiber Network (NOFN) programme. She is a Graduate of Economics from the University of Pennsylvania.

Yogi Dewan

CEO & Founding Partner,
Hassium Asset
Management LLP, UK

Mr. Dewan looks after the financial affairs of a select group of private families. Mr. Dewan founded Hassium in 2006 having spent ten years in the Private Wealth Management division at Goldman Sachs in London, where he built and managed a pan-European business working with some of the wealthiest families in Europe. Mr. Dewan also works with clients and intermediaries as an investment consultant and expert witness when required. He has almost 20 years of professional investment management experience and is actively involved in strategic asset and currency allocation decisions, security selection and educational support for Hassium's clients. Mr. Dewan also comments regularly on the financial markets and has been a regular contributor to CNBC, Bloomberg, the Financial Times, Sky and the BBC.

Zarina Screwvala

Founder & Managing Trustee,
Swades Foundation,
India

Ms. Screwvala is the Founder of the Swades Foundation & works full time as its Managing Trustee. Previously known as SHARE (Society to Heal Aid Restore Educate), Swades Foundation operates with the single-minded focus of empowering rural India through holistic and sustainable growth by creating partnerships between Rural India, Corporates, Young India, the Government and other Foundations to create permanent, irreversible change for good, her special passion is for transformational education that is both joyful and empowering. Ms. Screwvala is also one of the three Founder-Directors of UTV, which is now Disney UTV. She has led the creation and launch of highly successful broadcast brands and also supervised the creation and launch of the #1 Kids Channel in Indonesia & Malaysia called Astro Ceria. Prior to that she has produced over 3500 hours of high TRP, award-winning television programming in multiple languages for every major broadcaster. She has been featured in Business Today's Most Powerful Women in Indian Business List for the last three years.

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