

INDIAN FAMILIES IN BUSINESS MEETING

“Achieving Longevity for Your Business”

October 21-22, 2020

Virtual Meeting

October 23, 2020

Networking Over Breakout Discussions

*An annual forum dedicated to significant Family Business Owners,
their Family Offices and Next Gen Family members*



Partners:

DSP INVESTMENT MANAGERS PVT LTD
AZB & PARTNERS
CANAM ENTERPRISES & FRR IMMIGRATION
INSTUT AUF DEM ROSENBERG

In affiliation with:

Organised by:

Campden Family Connect

Membership | Events | Research | Education | IPI
A Patni Family & Campden alliance

www.campdenfamilyconnect.com

INSTITUTE
for
PRIVATE
INVESTORS

Campden Wealth

Events | Publishing | Research | Education | IPI

WELCOME



**Amit
Patni**

Dear Delegate,

I hope you and your families are well during this difficult and challenging time.

I am delighted to extend a warm welcome to you for Campden Family Connect's annual **Indian Families In Business Meeting**.

Over the next three days, our experts will address topics across business and investment opportunities, through both perspectives – Indian and Global.

We have a great 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, expertise, and stories. We plan to keep the proceedings as informal as we can, with each session having time set aside for questions and debate. Please feel free to ask the speakers any questions at the end of each session.

We would like to thank our partners: **DSP Investment Managers Pvt Ltd., AZB & Partners, CanAm Enterprises & FRR Immigration and Institut Auf Dem Rosenberg** who have so kindly assisted us in planning this forum.

Our members across the globe have used these recent times to be actively engaged with the community on our virtual forums. Campden teams globally have produced over 70+ webinars and annual forums with a varied range of relevant topics in the last 6 months.

I would like to thank our esteemed Members, for their overwhelming response and support and continually believing in our offering.

As we constantly strive to improve the quality of our sessions, we are keen to hear your thoughts on this virtual forum and receive your feedback.

Should you require any assistance during the sessions, please do not hesitate to contact any member of the Campden Family Connect team.

I wish you an enjoyable and stimulating three days ahead.

Yours faithfully,

Amit Patni

Director

Campden Family Connect



ACHIEVING LONGEVITY FOR YOUR BUSINESS

Due to the ongoing Covid-19 situation, global travel restrictions and new limitations on in-person events we are unable to run the Indian Families in Business Meeting in-person in Mumbai. We will instead be building on this year's online series of events and be hosting the event digitally, on the 21-23 October 2020.

Attendees will be able to participate online and benefit from everything a Campden event would normally offer - industry leading content, speakers from some of the world's foremost families and importantly family to family networking. Attendees are required to pre-register and will receive full details, access links and schedule in advance of the event.

KEY HIGHLIGHTS OF THE DIGITAL MEETING INCLUDE:

- **Cutting-Edge Content** - The programme is focused on the theme of "Achieving Longevity" - how families will be running their business in the New World.
- **Peer-To-Peer Insight And Intelligence** - Hear directly from both senior executives and family principals of some from the foremost global business families.
- **Networking with Leading Families** - Going beyond a normal digital event with one-way talks and presentations, over the 3 days we have designed multiple dedicated sessions allowing family office execs and principals to meet, network and discuss in private and discreet small groups and "virtual rooms".

If you wish to better understand the family business and investment landscape and ensure you have the expertise and knowledge to capitalise on the opportunities within the sector, this global macro event is a must-attend meeting which is built around 3 pillars showing families how to:

- **Align to a purpose in order to clearly define a multi-generational strategy**
- **Build a strategy around the individual/family taking into account inherent goals, objectives and biases**
- **Adopt cutting-edge investment strategies to achieve the best possible returns**

We designed this meeting to bring together highly prominent family principals, chief executives of private family offices and innovative strategists to share their experience, learn from each other and network within their peer group. Our excellent array of speakers representing global family businesses and investment experts will showcase best practice approaches to highlight the most vital trends and models and identify the investment opportunities of the future.

THREE WAYS TO REGISTER:

- 1 Call Devashree Shetye on +91 84339 93963 or Swapnil Nelugal on +91 84339 94740
- 2 Email at info@campdenfamilyconnect.com
- 3 Book online at campdenfamilyconnect.com/IFBM_2020.php

ADMINISTRATIVE NOTES



CONTENTS

Within this booklet you will find: administrative notes, programme, speaker biographies, partner information and details of forthcoming events.



MOBILE PHONES

Please ensure your mobile phone is switched off/silent at all times during the Meeting



REGISTRATION

The registration will be done virtually. You will need to fill out the “Complete My Registration” via a designated link sent to you from our events team. You will then receive the Access Code and Meeting ID. Should you require assistance, please do not hesitate to contact any member of the team who will be happy to help you in any way they can.



VIRTUAL MEETING

Please download the Zoom application onto your desktop. Our team will email you the Access Codes and Meeting ID in advance of the meeting



VISUAL & VIRTUAL BACKGROUND

Chairperson, Speakers and the Campden Team will have a Virtual Background. We suggest during the Main Meeting Room you use the “Speaker View” to have better viewing experience of the presentations/shared screens by speakers.



NETWORKING & BREAKOUT DISCUSSIONS

We will allocate those who wish to network with one and another into a Breakout Room. You don't need to do anything just simply stay online. You will then automatically be added to the Main Meeting Room once it is about to commence.



PROGRAMME

Meeting timings are indicated in the programme – any changes to these will be announced by the conference chairman. 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.



COPYRIGHT NOTICE

Campden Family Connect retains copyright on The Indian Families in Business Meeting and all materials relating to it, unless otherwise stated, © Copyright Campden Family Connect 2020.



AUDIO

While attending the meeting, please make sure you are in a quiet place to reduce any ambient noise/disruption



NO RECORDING

No recording of any sort (video or audio) is permitted during this Meeting.

PROGRAMME SCHEDULE

Wednesday, October 21, 2020

- 15.15 – 16.00 **PRE-SUMMIT VIRTUAL NETWORKING**
Only for Campden Members and pre-registered delegates
- 16.00 – 16.05 **WELCOME REMARKS BY AMIT PATNI, DIRECTOR, CAMPDEN FAMILY CONNECT**
- 16.05 – 16.15 **OPENING REMARKS BY CHAIRPERSON**
As the Chairman of the Global Shipping & Logistics Group, Ramesh S Ramakrishnan has transformed the organization from a shipping agency to one with a global footprint and expertise covering the complete range of solutions from Ship Owning, Project Logistics to Warehousing.
In this session, Ramesh will walk us through his journey in achieving business longevity and sustaining market leadership for more than 4 decades and also his business vision for the #NewWorld
Ramesh S Ramakrishnan • Chairman, Transworld Group
- 16.15 – 16.55 **HOW ARE LEGACY FAMILY BUSINESSES RETAINING THEIR MARKET LEADERSHIP AND SPOTTING NEW OPPORTUNITIES IN THE CURRENT ENVIRONMENT.**
In the light of fiscal policies, on-going trade wars, demand for localized manufacturing and various large M&As, how are legacy family businesses re-aligning strategies to retain their market leadership and spotting new opportunities in the current environment.
Moderator: Dr. Aarti Gupta • Chief Investment Officer, DBR Ventures (Jagran Family)
Dilip Piramal • Chairman, VIP Industries Ltd
Perizaad Zorabian • Director, Zorabian Chicken
- 16.55 – 17.25 **HOW TO LOSE MONEY**
Investors more often than not fall prey to emotional decision making. This makes us display behaviours that can be detrimental to our portfolio health over the long- term. Recognizing and avoiding these blindspots is the key to earn better investment outcomes.
Kalpen Parekh • President, DSP Investment Managers Pvt. Ltd.
- 17.25 – 17.55 **PRIVATE EQUITY REAL ESTATE INVESTMENT AND INVESTMENT IMMIGRATION**
U.S. Investment Immigration or EB-5 Visa is a pathway for High Net Worth Individuals to gain permanent residence to the United States. With experts on board, this panel will discuss the process and advantages of gaining U.S. Green Card through investment immigration while also throwing light on the advantages of investing in U.S. real estate through private equity funding.
Moderator: Abhinav Lohia • Director South Asia & the Middle East, CanAm Investor Services
Jeff DeCicco • Chief Executive Officer, CanAm Investor Services
Janak Mehta • Co-Founder, FRR Immigration
- 17.55 – 18.30 **UNLEASHING BUSINESS STRATEGIES FOR TECHNOLOGICAL TRANSFORMATION**
The pandemic accelerated the adoption of technology and digitization across sectors. Today, those who did adapt gained a competitive edge over the laggards who are struggling to cope with disruptions. In discussion with CIOs/CTOs of leading family businesses, this session will analyse how organizations are unleashing strategies for adaptation of technology, with an increased focus on cybersecurity.
Moderator: Dr. Avadhut Parab • Associate Vice President - IT, Global, Wockhardt Ltd.
Jitendra Singh • Chief Information Officer, JK Cement
Satyanarayana Kasturi • Group IT Head, Ashok Piramal Group
- 18.30 **CLOSING REMARKS**

PROGRAMME SCHEDULE

Thursday, October 22, 2020

15.15 – 16.00 **PRE-SUMMIT VIRTUAL NETWORKING**

Only for Campden Members and pre-registered delegates

16.00 – 16.05 **REGISTRATION AND OPENING REMARKS BY CHAIRPERSON**

Ramesh S Ramakrishnan • *Chairman, Transworld Group*

16.05 – 16.35 **IN THESE UNCERTAIN TIMES, THE TIME IS NOW**

To just say “health is wealth” and ignore personal wealth accumulated with one’s blood, sweat and tears, is to significantly undermine the importance the latter plays in our lives. In the unprecedented situation we all find ourselves in, apart from the obvious physical and mental well-being, protection and ring-fencing of wealth is of utmost importance. Estate and succession planning comprises of various complexities and if not done properly and at the right time, can lead to a significant deterioration in the value of one’s wealth. Join us as we take you through the various facets of estate and succession planning in these uncertain times and the do’s and don’ts, wills, advanced medical directives, trusts, HUFs, family settlements and family offices and their interplay with things that form an integral part of our day-to-day life – personal debt, personal guarantees, personal holdings and pledges.

Zia J. Mody • *Co-Founder & Managing Partner, AZB & Partners*

16.35 – 17.10 **ARE YOU ‘WORK FROM HOME’ READY? OUTLOOK AND BUSINESS IMPLICATIONS**

6 months back, when economies around the world went into COVID freeze mode, WFH culture was embraced and adopted across business sectors. As it proved to be a smart, convenient and cost effective concept, this culture is all set to stay. However, is it feasible for all employees and organizations? What are business families’ sentiments towards WFH culture and what are the probable business implications?

Moderator: Aditi Kothari Desai • *Director on the Board, Head of Sales, Marketing and E-Business, DSP Investment Managers*

Darshan Hiranandani • *Managing Director & CEO, H-Energy Global*
Janak Sarda • *Managing Director, Deshdoot Media Group*

17.10 – 17.40 **ENTREPRENEURSHIP WITHIN A GLOBAL FAMILY BUSINESS**

As the Vice Chairman of the 120-year-old global family enterprise, comprising both operating and investment companies, Shiv Vikram Khemka is principally responsible for SUN Group’s investments in natural resource opportunities. He led the Group’s activities in Latin America from 1985-1990 and then in the former Soviet Union until 2015. In 1992, Shiv founded SUN Brewing (later SUN InterBrew), which is today the largest brewer in Russia and Ukraine. He went onto sell SUN Brewing in 2004 at a valuation of approximately 4 billion dollars. He has also led the Group’s investments in the Mining sector in Russia, Kazakhstan, India, and various African countries. Today, the Group owns a stake in one of Russia’s 8 largest gold mines, Kluchevskoye, in partnership with China National Gold. Shiv has also led the Group’s investments in Oil & Gas, investing in Russia and several other countries in Africa, Asia, and North America. The Khemka family foundations have helped establish several significant institutions in India and abroad including the Indian School of Business, the Public Health Foundation of India, the Skolkovo Business School in Russia, and Brookings India.

In this keynote session, hear his story of entrepreneurship within a global family business, his passion for mentoring NXG in the start-up space, family foundation, managing family relations along with running a business and much more

Shiv Vikram Khemka • *Vice Chairman, SUN Group*

PROGRAMME SCHEDULE

Thursday, October 22, 2020

17.40 – 18.15 **IN CONVERSATION WITH A BUSINESS LEADER-AMEERA SHAH, METROPOLIS HEALTHCARE**

For the last 20 years, Ameera Shah has focused on delivering sustained growth, built, and led corporate functions, including finance, strategy, business process optimization, innovation, investor relations etc. Under her leadership, Metropolis raised the bar of diagnostic accuracy, technological equipment, customer experience and research driven, empathetic service and is today a reputed chain of pathology labs with a loyal customer base across India, South Asia, and Africa. Ameera has led the corporate transformation of Metropolis by setting protocols, hiring expert professionals for the management team, and bringing together a fully actualized board. Due to its unique growth model and competitive advantage, Metropolis has attracted three rounds of investment by reputed private equity investors and was successfully listed at the stock exchanges in April 2019 at a 9% premium amidst challenging market circumstances.

In this session, hear Ameera share her business learnings and strategies that helped Metropolis face changes and challenges head-on, while retaining the market leadership position

Ameera Shah • *Promoter & Managing Director, Metropolis Healthcare*

18.15 **CLOSING REMARKS**

BREAK-OUT DISCUSSION

Exclusive for Campden Club Members

Friday, October 23, 2020

16.00 – 16.05 **REGISTRATION**

16.05 – 17.00 **BREAK-OUT DISCUSSIONS**

- **Is India geared up to take on available opportunities to become the next investment destination? What's the ground reality?**

The current global trade-wars with China has put India in a highly opportunistic situation. However, does India have the wherewithal to seize this opportunity and grow? What are the on-ground challenges and realities?

- **The larger companies are growing their market share through M&As. How can existing family businesses compete against newly merged large companies? Should they acquire or sell to sustain themselves?**

17.00 – 17.15 **KEY TAKE-AWAYS AND CLOSING REMARKS**

PARTNER

DSP MUTUAL FUND

DSP Investment Managers is one of the premier asset management companies in India, with an over two-decade track record of investment excellence, currently managing assets (Mutual Fund schemes, Alternative Investment Fund schemes and investment management of Offshore Funds) amounting to US\$ 12.9 bn (~ Rs. 95,000 crore*).

The 150+ year old DSP Group is headed by Mr. Hemendra Kothari and is one of the oldest and most respected financial services firms in India, having commenced its stock broking business in the 1860s. The earlier generation of the family was among the founding members of the Bombay Stock Exchange in the 1870s. Over the past one and a half centuries, the family behind the Group has been very influential in the growth and professionalization of capital markets and money management business in India.

Today, we have the honour of managing money for over 28 lakh investors from all walks of life: hard-working salaried individuals, high-net-worth individuals, NRIs, small and mid-sized business owners, large private & public corporations, trusts and foreign institutions. We take great pride in knowing that we play a key role in the creation of wealth for all our investors and will always continue to be an organization with a purpose - it is our responsibility to make a real difference to the lives of our investors.

Our endeavor is to keep helping investors make more responsible investing decisions and we are committed to providing a broad range of investment solutions to them while striving to achieve the right balance between risk and opportunity. Our process-oriented and well-researched approach to investing has held us in good stead over the years. We believe that experienced investment professionals using a disciplined investment framework and sophisticated analytical tools can consistently deliver value to investor portfolios. This philosophy, combined with a strong investment culture focused on excellence and teamwork, enables us to navigate different market conditions, take measured risks and optimize investment opportunities.

Our investors' interests will always remain at the core of our business and we will continue to maintain a relentless focus on doing what's best for them, as we, together, #InvestForGood.

**Source: Internal, as on September 30, 2020. Mutual Fund Investments are subject to market risks, read all scheme related documents carefully.*



Kalpen Parekh

President
DSP Investment
Managers Pvt. Ltd.

Kalpen Parekh is the President of DSP Investment Managers Pvt. Ltd. and a member of the Executive Committee. Kalpen has over 20 years of experience in sales across client segments, distribution and marketing. He was previously Managing Director and Head of Sales & Marketing at IDFC Mutual Fund. He has also served in Birla Sun Life Asset Management Company Limited and ICICI Prudential Asset Management Company Limited after beginning his career with L&T Finance Ltd.

Kalpen holds a Master's Degree in Management Studies in Finance from the Narsee Monjee Institute of Management Studies, as well as a Bachelor's Degree in Chemical Engineering from Bharati Vidyapeeth, Pune.

For further information please contact:

Yamini Sood, Head- Institutional Sales and Family Offices

DSP Investment Managers, 10th Floor, Mafatlal Center, Nariman Point, Mumbai 400 021

Phone: +91 98206 02949 Email: Yamini.sood@dspim.com

PARTNER



AZB & PARTNERS
ADVOCATES & SOLICITORS

AZB & Partners is one of the prominent law firms in India. It was founded in 2004 with a clear purpose to provide reliable, practical and full-service advice to clients, across all sectors. The Firm brought together the practices of CZB & Partners in Mumbai and Bangalore and Ajay Bahl & Company in Delhi. Having grown steadily since its inception, AZB & Partners now has 6 offices across Mumbai, Delhi, Bangalore, and Pune.

We have an accomplished and driven team of 450+ lawyers committed to delivering best-in-class legal solutions to help clients achieve their objectives. Our greatest strength is an in-depth understanding of legal, regulatory and commercial environments, in India and elsewhere. This strength enables us to provide bespoke counsel to help our diverse clients negotiate any dynamic or volatile business environment. At AZB & Partners, collaboration is an everyday reality – we combine individual and mutual strengths to achieve collective growth, think laterally and solve problems with a fresh and relevant.

The Firm's clients include an array of domestic and international companies. These range from privately owned to publicly listed companies, including Fortune 500 Entities, Multinational Companies (MNCs), Investment Banks and Private Equity Firms. The Firm has also built, through its many professional engagements, strong relationships with specialists and several international law firms.

AZB & Partners is proud of the quality of professional talent it fosters. Every lawyer is firmly dedicated to serving clients and delivering effective counsel at all times. Though our lawyers represent a diverse mix of backgrounds, they each share a proven record of academic and professional excellence. Several professionals in the Firm are graduates from premier global universities, including Harvard, Columbia, Cambridge, Oxford and the London School of Economics, among others. Several partners are members of international bar associations, notably New York.



Zia J. Mody

*Co-Founder &
Managing Partner*
AZB & Partners

Zia J. Mody, Co-Founder and Managing Partner of AZB & Partners, is one of India's foremost corporate attorneys. Zia is widely acknowledged for her expertise, ranking No. 1 in Fortune India's 'India's 50 Most Powerful Women in Business' list in 2018 & 2019, on which she has consistently ranked in the top 10 since 2011. According to the RSG India Report, clients praise Zia as a "problem solver," who is "meticulous," "thorough" and "accessible," and comes highly recommended for "any complex legal matter."

For further information please contact:

Zia Mody, Co-Founder & Managing Partner

AZB & Partners, AZB House, Peninsula Corporate Park, Ganpatrao Kadam Marg, Lower Parel, Mumbai - 400013

Phone : +91 22 4072 9999 Email: mumbai@azbpartners.com Web: www.azbpartners.com

PARTNER



CanAm Enterprises
EB-5 U.S. Immigration

CanAm Enterprises is a full-service financial firm headquartered in New York City. CanAm specializes in U.S. Investment Immigration or EB-5 Visa and Private Equity Real Estate Investments in the United States. Since 1987, CanAm has funded over 60 real estate and infrastructure projects and raised over \$3 Billion. More than 6,000 High Net Worth Investors from across the world have trusted CanAm with their immigration and financial goals. CanAm is the leading sponsor of U.S. investment immigration in the United States and is an industry leader in repayment of capital to EB-5 investors. For more information log on to www.canamenterprises.com

FRR
IMMIGRATION

FRR is a Financial Services Corporate headquartered in Mumbai, India. FRR, with a staff strength of 84 experienced people pan India, is engaged in Immigration by Investment, Foreign Exchange Money Changing, Stock Broking and Inter Bank Foreign Exchange Broking. Under the Immigration by investment arm, FRR has carefully handpicked the programs for: USA, Portugal, Grenada, Malta, Cyprus, Turkey, Canada and UK. FRR Immigration also offers individuals the opportunity to invest in US Business Franchises. We have executed business for those seeking US Green Cards (74 applications) and Grenada passports (6 applications). We are the only SEBI (Securities Exchange Board of India) approved broker dealer based in India conducting Immigration by Investment business.



Mr. Jeff DeCicco
CEO,
CanAm Investor Services

Jeff is the CEO of CanAm Investor Services a broker dealer exclusively affiliated with CanAm Enterprises. He is a finance professional with over 25 years of experience which includes heading options trading desk at a leading investment firm on Wall Street. He has successfully navigated emerging markets for CanAm since 2014.



Mr. Abhinav Lohia
Director - South Asia
& Middle East,
CanAm Investor Services

Abhinav is the Director of South Asia & the Middle East at CanAm Investor Services. He is an Indian American dual qualified lawyer and a finance professional. He heads Canam's investment immigration and private equity business development in the region.



Mr. Janak Mehta
Co-Founder
FRR Immigration

Janak Mehta is the Co-Founder of the FRR Immigration. He has an experience of 34 years, in the capital markets of India. He is a commerce graduate from the Mumbai University and a graduate from the Harvard Business School for the OPM executive programme and the Indian School of Business. He has been on several committees of Bombay Stock Exchange (BSE) and ANMI. He is associated with several NGO's. In 2020, he was awarded the TOP 25 Award - Agenct by UGlobal Magazine.

For further information please contact:

Abhinav Lohia, Director, South Asia & the Middle East

Canam Investor Services, LLC, Wall Street Plaza, 88 Pine Street, Suite 2010, New York, NY 10005

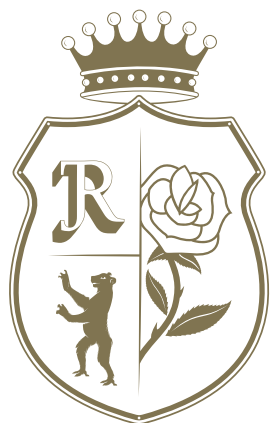
Phone: +1 201-920-8438 Office: +1 212-668-0690 ext. 248 Website: www.canamenterprises.com

Jay Mehta, Director

FRR IMMIGRATION, 103C Mittal Tower, Nariman Point, Mumbai, 400021

Cell: +91 9833359160 Office: +91 22 43344212 Website: www.frrshares.com

PARTNER



INSTITUT
AUF DEM
ROSENBERG

THE ARTISANS OF EDUCATION®



Manuel Bernardo

*Head of Relationship
Management,
Admission &
Communication*

**Institut auf
dem Rosenberg**

Institut auf dem Rosenberg, the artisan of education, is a private, international boarding school located in St. Gallen, Switzerland pioneering a 'Talent & Enrichment Programme' to give students an insight into the rapidly evolving and digital 21st Century work place, so that they learn skills beyond the classroom to prepare them for the outside world.

For over 130 years and over four generations of the Gademann family, this boutique artisanal establishment has offered an unmatched learning environment promoting individuality and fostering natural curiosity, whilst enabling excellent academic achievements. With a unique holistic, creative and entrepreneurial approach to education, Institut auf dem Rosenberg is among the best international boarding schools worldwide and offers over 40 courses outside of the core academic curriculum.

Also unique to Rosenberg is the Individual Development Plan – IDP® Department, which ensures that pupils of all ages receive personal guidance to carefully plan and support their individual development by identifying and nurturing their talents.

The school caters for 6 – 19-year olds and offers a truly international, multilingual environment, where 230 pupils of 47 nationalities communicate in several languages. The staff to student ratio is 3:1 with an average class size of eight students to ensure everyone receives individual attention and enables the delivery of excellent academic results

After successfully graduating from Institut auf dem Rosenberg in 2009, Manuel moved to the famous Ecole hoteliere de Lausanne (Hotel school Lausanne) to pursue his Bachelor of Science in International hospitality Management. After 4 years of studies and completing several internships within the communication and sales department of an international luxury hospitality firm, he moved on to become a professional in Marketing.

Having worked and made his way up quickly being promoted as Director of Sales & Marketing by the age of 28 in one of the most prestigious and luxurious hotels in Switzerland - The Chedi Andermatt, it was time to go back home to Rosenberg. Together with the Management Team as well as in close corporation with Mr. & Mrs. Gademann, Manuel now heads the Admission, Communication and Relationship Management of the "most prestigious international boarding school 2019" Institut auf dem Rosenberg. Manuel is well known for his extensive passion for arts, culture and culinary as well as his classic car collection.

For further information please contact:

Manuel Bernardo, Head of Communications & Relationships Management

Institut auf dem Rosenberg - The Artisans of Education®, Höhenweg 60, 9000 St.Gallen, Switzerland

Tel.: +41 71 277 77 77 Fax: +41 71 277 98 27 Email: m.bernardo@instrosenberg.ch Web: www.instrosenberg.ch

SPEAKER BIOGRAPHIES

CHAIRPERSON:



**Ramesh
Ramakrishnan**
Chairman,
Transworld Group

With over 35 years of experience, Ramesh built the organization from a Shipping Agency house in Mumbai to an Industry leader & trend-setter, built on the values of Integrity, Transparency, Respect, Customer Centrality, Excellence and Social & Environmental Responsibility. Under his leadership and business acumen, Transworld Group today is uniquely positioned as a fully integrated logistics & shipping company with its global footprint across all aspects of supply chain.

A resident of UAE since 1989, Ramesh is a deeply spiritual person & strives to spread the value of 'compassion for all'. He is also a well-recognized philanthropist who contributes and supports many charitable trusts and worthy causes.

Ramesh has successfully completed the Owner / President Management Program from the prestigious Harvard Business School and has many accolades to his fame. He was also recognized by Forbes Middle East as the "Top Indian Leader in the Arab World, consecutively for 4 years, from 2016 to 2019.



**Dr. Aarti
Gupta**
Chief Investment Officer,
**DBR Ventures
(Jagran Family)**

Married into the promoter family of the Jagran group, Dr. Gupta has been managing the Family Office of Mr. Devendra Mohan Gupta, for the last 9 years.

Dr. Gupta is currently the Chairperson for FICCI FLO Kanpur Chapter, and has been instrumental in bringing forward pertinent issues related to growth of women entrepreneurs both at the state and national levels. She also serves on the board of Harvard Global Women Empowerment & IIT Kanpur's INVENT cell.

Named amongst the 22 Top Women Investors in the country by Inc42, Dr. Gupta holds a doctorate in Economics from IIT Kanpur, a post graduate diploma in business studies from Harvard University, and a Master's degree in Economics from North-Eastern University.



**Aditi Kothari
Desai**
*Director on the Board,
Head of Sales, Marketing
and E-Business,*
**DSP Investment
Managers**

Aditi serves as a member of the Executive Committee of DSPIM.

She is passionate about the digitization of the financial sector and was instrumental in the launch of all DSP's digital platforms including its investment, education, corporate and distributor platforms. She is very focused on the future of investment management and its distribution and is therefore very engaged in fintech for the wealth space. Aditi also leads financial wellness initiatives at DSPIM and was instrumental in launching Winvestor, a special initiative aimed at empowering women with confidence and financial knowledge to plan for their economic and long-term security.

Aditi is a Trustee in the Hemendra Kothari Foundation as well as the Wildlife Conservation Trust. She is also an Independent Director at Godrej Agrovet and serves on the Board of DASRA.

Aditi holds a Bachelor of Science degree in Economics from the Wharton School of the University of Pennsylvania and an MBA from Harvard Business School.



**Ameera
Shah**
*Promoter &
Managing Director*
Metropolis Healthcare

Ameera has played an instrumental role in changing the pathology industry landscape in the country. For the last 20 years, she has built Metropolis into a leading and reputed chain of laboratories with a wide network of over 2900 laboratories and patient service centers. Under her leadership, Metropolis had a successful listing at the Stock Exchanges in April 2019.

She was named amongst Asia's Power Businesswomen List by Forbes Asia 2020, Most Powerful Women in Business by Fortune India (2017, 2018, 2019) and by Business Today (2018, 2019). She launched Empoweress in October 2017, which is a peer-to-peer mentoring and networking ecosystem for women entrepreneurs. She is also an independent director on the boards of Kaya, Torrent Pharma, Shoppers Stop and an advisor to Baylor College of Medicine, Texas

SPEAKER BIOGRAPHIES



Dr. Avadhut Parab

*Associate Vice President
- IT, Global,
Wockhardt Ltd.*

A business and IT strategist with over 22 years of experience in Enterprise systems across globe, Avadhut holds a doctorate in Business Management. During his professional stint, he has successfully delivered more than 10 full cycle SAP implementation projects. Backed by proven ability to bring the benefits of Information System to resolve business challenges, Dr. Avadhut is also experienced in Digital transformation, business technology advocacy and leadership, technology delivery & project management and budgeting and cost containment. He is also experienced in setting up the complete IT and Cyber security solutions for a global organization



Darshan Hiranandani

*Managing Director &
CEO,
H-Energy Global*

Darshan leads the two new verticals of the Hiranandani Group- H-Energy Global that has developed India's first Floating LNG re-gasification terminal and Yotta Infrastructure Solutions LLP, where he is the Managing Partner, that has developed Asia's largest Tier IV Data Center.

Darshan started his professional career pioneering the development of 23 Marina, a 90 storey, 400m residential tower in Dubai – the world's 3rd largest residential tower. His achievements also include the establishment of the Dr. L.H. Hiranandani Hospital under the Hiranandani Foundation, which won the coveted Ramakrishna Bajaj Award for the best hospital in India.

He holds a Master's degree with major in Entrepreneurship and Finance from the Rochester Institute of Technology, USA.



Dilip Piramal

*Chairman,
VIP Industries*

An industrialist with more than 45 years of vast and rich experience, Dilip G. Piramal is the pioneer of the luggage industry in India, with VIPIL being the first company to launch moulded luggage and subsequently moulded chairs in 1985. Today, under his leadership, the company has more than 8,000 retail outlets across India, a network of retailers in 50 countries and has four major brands in various market segments: VIP, Carlton, Skybags, Aristocrat and Caprese.

Dilip is involved in various professional and social fora. He also takes active interest in social and philanthropic activities & is involved with the Piramal Education Trust in his ancestral hometown Bagar, Rajasthan.

In February 2020 he was awarded the Economic Times Polymers Lifetime Achievement Award 2020.



Janak Sarda

*Managing Director,
Deshdoot Media Group*

A man who believes in leading by action and setting examples, Janak is a self-driven personality and is the young leadership at the 90 year old Sarda family enterprises. He manages operations of Deshdoot Group of Newspapers in India, Blue Logic Digital – AI based consultancy in Dubai, Calculus Technologies - solution provider for travel industry in Germany and Icube Consortium - delivering technology based HR solutions in Singapore. He also actively manages family business sectors including Publishing, IT, Real Estate, Hospitality, Commercial Printing and Packaging industries.

A leader with a vision, Janak is currently serving as the Vice President Global - Young Professionals, International Advertising Association, New York. He has been recognised with Global Young Leader Award (2018) by International Advertising Association.



Jitendra Singh

*Chief Information Officer,
JK Cement*

A techno-functional Digital CIO with experience in conceptualizing and delivering solutions across divisions on Web, Mobile, eCommerce and other platforms, Jitendra is passionate about creating and scaling new environment in the Internet and Mobile space. He brings with him 29 years of experience in Management & Governance of Information Systems and Technology including IT Strategy, Roadmap, Team Building, Budgeting and Compliance (Regulatory, Software & Hardware), Analytics in Manufacturing Industry covering Pharmaceutical, Healthcare, Retail, Power, Chemical, Automotive & Building Material. At JK Cement, he is responsible for Digital Transformation in the organization involving People, Process and Technology as core pillars.

SPEAKER BIOGRAPHIES



Perizaad Zorabian

Director,
Zorabian Chicken

Having created a unique niche for herself as an actress in independent offbeat cinema - Perizaad is now full-time Director of her family business, Zorabian Chicken, which was started by her father Mr. Khoram Zorabian, 38 years ago.

Over the years, Zorabian Chicken has moved from being a respected brand in the wholesale space to being a retail brand with a brand loyalty that is prized and cherished.

Perizaad works passionately with a team of young, driven individuals who believe in the brand and its core values. She is a Mumbai University Gold Medalist, a trained Western Classical Ballet dancer and holds a MBA in Marketing from City University of New York.



Satyanarayana Kasturi

Group IT Head,
Ashok Piramal Group

Kasturi has over 26 years' of experience. He started his career in the domain of IT in manufacturing environment and thereafter moved into Leadership roles like CIO / Group CIO. He has worked in Pharma, Steel, Power, EPC, Real-estate, Textile industries before moving into the diversified conglomerate -Ashok Piramal Group at the end of 2017. Specialized in digitalisation, Kasturi has led his organizations through formulating and realizing long term IT strategies and Business Transformation initiatives. He has also developed solution templates for global roll-outs and has played key roles in mergers and integration of acquisitions.



Shiv Vikram Khemka

Vice-Chairman,
SUN Group

A 120-year-old global family enterprise comprising both operating and investment companies, Shiv is principally responsible for the group's investments in natural resource opportunities.

Shiv is Chairman of the Indian representation to the Shanghai Cooperation Organization Business Council, a member of the BRICS Business Council and member of the Russian Prime Minister's Foreign Investment Advisory Council. He also sits on the National and International Councils of the Confederation of Indian Industry (CII) and is also a member of the Young Presidents Organisation's Inter-Continental (YPO-IC) chapter. He is currently on the board of board of the Lauder Institute and the Centre for the Advanced Study of India (CASI) at the University of Pennsylvania. He also serves on Yale University's President's Council on International Activities and the Asia Society Policy Institute's Global Council.

Shiv is Chairman of the Global Education & Leadership Foundation (tGELF), which works with youth in over 187 countries to encourage leadership and entrepreneurship with a focus on UN Sustainable Development Goals(SDGs).

He studied at Eton College, earned a BA in economics from Brown, an MBA/MA with distinction from the Wharton School of Business and the Lauder Institute at the University of Pennsylvania.

CAMPDEN VIRTUAL CALENDAR

October 20–22	Virtual Family Investment, Impact & Ethics Meeting Campden Wealth	11am–5pm (New York)
October 21–22	Indian Families in Business Meeting Campden Family Connect	3:30pm (India)
October 21–22	MedTech Investing Europe Campden Wealth	1pm (London)
October 23	Indian Families in Business Meeting: Break-Out Sessions Campden Family Connect	4pm (India)
October 27	Women & Wealth Institute for Private Investors	2pm (New York)
October 28	Virtual NextGen Seminar: Globalization Campden Wealth	1pm (New York)
October 29	Campden Club Virtual Fund Meeting Campden Club	2pm (London)
October 29	In Conversation: Jeff Immelt (Lessons Learned as a CEO & Investor) Institute for Private Investors	2pm (New York)
November 2	UK Investment Opportunities Campden Wealth	2pm (New York)
November 5	Post US Election Special Institute for Private Investors	1pm (New York)
November 5	Needs & Leads Institute for Private Investors	2pm (New York)
November 5	The European Family Office Forum (In-person/ Virtual Hybrid) Campden Wealth	
November 6	Learnings From Patni Family: The Pioneer In Family Office Space Campden Family Connect	4pm (India)
November 10	Women & Wealth Institute for Private Investors	2pm (New York)
November 11	In Conversation: Jeremy Grantham (Founder of GMO) Institute for Private Investors	2pm (New York)
November 12	Virtual NextGen Seminar: Succession Planning & Decision Campden Wealth	1pm (New York)
November 16–18	Virtual Family Office Meeting Campden Wealth	11am–5pm (New York)
November 19	Women & Wealth Institute for Private Investors	2pm (New York)
November 20	India Webinar Campden Family Connect	4pm (India)
November 24–26	European Families In Business Meeting Campden Wealth	10:30am (London)
December 1	Campden Club Virtual Fund Meeting Campden Club	2pm (London)
December 1–2	IPI Virtual Forum Institute for Private Investors	11am–5pm (New York)
December 3	Needs & Leads Institute for Private Investors	2pm (New York)
December 7–8	Virtual Family Investment Meeting Campden Wealth	11am–5pm (New York)

CAMPDEN VIRTUAL CALENDAR

SESSION FORMATS & DESCRIPTIONS

Needs & Leads (every two weeks): An IPI member-led session designed to tap into the insight and connections of fellow peers in a confidential setting. Members may share business and investment “needs” followed by clarifying Q&A, and receive “leads” from participating IPI members in return - all in 2.5 minutes! A great opportunity for members to share their pressing investment and business challenges and receive peer support.

Virtual Family Investment, Impact & Ethics Meeting (October 20–22): Adapting and innovating your purposeful portfolio – This three-day event will provide investors and family office principals with the case studies on investments and macro trends, followed by a deep dive into successful tactics for ESG and impact investing, plus philanthropic giving.

MedTech Investing Europe (October 21–22): MedTech Investing Europe is the longest-established and leading healthcare investment and partnering conference in Europe. We are delighted to once again bring together the very best game-changing technologies and leading entrepreneurs with a wide range of healthcare investors including VC's, angel investors, leading MedTech corporations, private wealth holders, family offices and many more.

Women & Wealth (October 27, November 10 & November 19): Campden Wealth & The Institute for Private Investors is hosting seminars for our network of female family members and CEOs around the world to hear stories, provide insights, and improve critical decision making. By achieving this the network supports members' leadership roles within their family and Family Office and beyond this, sharing, owning and understanding the importance of women leaders in society. During these sessions we will hear from leading women from a broad array of backgrounds, including inheritors and wealth creators, entrepreneurs and investors. These captivating conversations will bring to light a variety of factors, opportunities and challenges that inspired these women, helping to shape who they are today.

Virtual NextGen Seminar: Globalization (October 28): Today's families and nextgen are more globally-focused than ever before. A family may be born in Thailand, attend college in London, intern on Wall Street, and start a technology firm in Silicon Valley. We will discuss how globalization is impacting families and what it means for the future of business.

In Conversation: Jeff Immelt – Lessons Learned as a CEO & Investor (October 29): Jeff joined NEA in 2018 as a Venture Partner on both the technology and healthcare investing teams. Jeff served as chairman and CEO of GE for 16 years where he revamped the company's strategy, global footprint, workforce and culture, transforming it into a simpler, stronger, and more focused digital industrial company. During his tenure, he led several innovative transformations which doubled industrial earnings, reshaped the portfolio, re-established market leadership, grew a strong share position in essential industries, and quadrupled emerging market revenue. Prior to being appointed Chief Executive Officer in 2000, Jeff held several global leadership roles at GE in the Plastics, Appliances, and Healthcare businesses and became an Officer of the company in 1989. He has been named one of the “World's Best CEOs” three times by Barron's, and while he was CEO, GE was named “America's Most Admired Company” by Fortune magazine and one of “The World's Most Respected Companies” in polls by Barron's and the Financial Times. He has received 15 honorary degrees and numerous awards for business leadership.

UK Investment Opportunities (November 2): We will host an informational segment about the UK's investment climate. Her Majesty's Trade Commissioner, Antony Phillipson will provide an update on topical themes for the UK like post EU transition, the Free Trade Agreement with the USA and our national covid response before introducing Red Rice Ventures and The Walpole for a look into current premium luxury brands opportunities in the UK.

Post US Election Special (November 5): Two congressmen will be joining us to discuss the results of the US election, the stimulus package, and take questions. IPI Member Doug Mellinger will be moderating the call. Rep. Tom Reed (NY-23) and Rep. Josh Gottheimer (NJ-5) are Co-Chairs of the Problem Solvers Caucus — In 2017 the Problem Solvers Caucus became an independent member-driven group in Congress, comprised of representatives from across the country – equally divided between Democrats (25) and Republicans (25)– committed to finding common ground on many of the key issues facing the nation.

Learnings From Patni Family, The Pioneer In Family Office Space (November 6): Amit Patni is the 3rd gen member of the Patni Family- founders of Patni Computer Systems (PCS), a family business which was instrumental in establishing the Indian IT Industry. With the family also being pioneers in establishing single Family Office in India as early as 2000s, Amit is hailed as a veteran in the family office ecosystem. In this session he will be sharing with his peers the Family's journey towards establishing one of the first family offices in India, his first hand learnings, benefits of having a family office & its functions, SMART tips to consider when planning for a Family Office and many other FAQs on this concept.

Virtual NextGen Seminar: Succession Planning & Decision (November 12): Wealth preservation and transfer is still the top priority for multigenerational families. However, critical questions often arise surrounding structure, timing, and to whom. We will address how families have tackled these challenging issues and tangible solutions next gen can use to discuss with their own families.

Virtual Family Office Meeting (November 16–18): Propelling your office into the next decade – A thorough examination of the culture, systems and best practices that help today's family offices thrive.

Virtual IPI Forum (December 1–2): The IPI Forum provides the opportunity for IPI members to come together for two days of education, community building and expert resources.

Virtual Family Investment Meeting (December 7–8): What to expect in 2021 – Leading investors will be providing their analysis of the last 12 months and their predictions for the 12. During this three-day event, we will be hearing from leading private investors from around the world about their plans for the next 12-24 months, and how they are changing and adapting their portfolios for 2021.

CAMPDEN CLUB

MEMBERSHIP

“Peer Networking and Education on a Global Scale for Families of Substantial Wealth”

The Campden Club, incorporating the Institute for Private Investors (IPI) and Campden Family Connect (CFC), is the pre-eminent membership club for:

- **Multigenerational business owning families**
- **Families of substantial wealth and their family offices**
- **Private Investors**

By joining the Campden Club, you become part of a global community of over 1,400 family members and family offices from 37 countries

Membership provides networking opportunities and unrivalled educational support to families and their next generation through:

- **Access to our global community**
- **Global and regional family wealth events**
- **Online communication with members around the world**
- **Co-investment workshops**
- **Member profiling and facilitated introductions**
- **Research, reports and intelligence**
- **Multigenerational education programmes**

“ In addition to gratitude, one of the strongest contributors leading to happiness is a sense of belonging to a community. I have to say that Campden has created an extraordinary community and I benefit from it by a large multiple of what I bring to it. Thanks for all you do. ”

Member since 2008

If you wish to network and engage with a global community of like-minded peers, make better decisions for your family’s legacy and build trusted friendships & business relationships in a safe harbour environment, then we invite you to consider Campden Club Membership.

To learn more about the membership opportunities, write to us at info@campdenfamilyconnect.com

www.campdenfamilyconnect.com

INDIAN FAMILIES IN BUSINESS MEETING 2020

Partners:

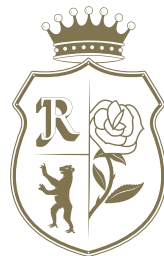
DSP
MUTUAL FUND



AZB & PARTNERS
ADVOCATES & SOLICITORS



CanAm Enterprises
EB-5 U.S. Immigration



INSTITUT
ROSENBERG

THE ARTISANS OF EDUCATION®

Organized by

Campden FamilyConnect

Membership | Events | Research | Education | IPI
A Patni Family & Campden alliance

The Capital, A Wing – Unit: 506,
Bandra-Kurla Complex, Bandra (E),
Mumbai – 51
+91 022 66940176

www.campdenfamilyconnect.com