



Private meetings for the world's leading families

THE INDIAN FAMILY OFFICE CONFERENCE

5 & 6 December, 2017
Trident, Bandra Kurla • Mumbai , India

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

Creating the Right Family Office Structure to Manage Wealth and Sustenance

Main Partner:

ADITYA BIRLA SUN LIFE MUTUAL FUND
EDELWEISS GLOBAL WEALTH MANAGEMENT
MOTILAL OSWAL ASSET MANAGEMENT

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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

Creating the Right Family Office Structure
to Manage Wealth and Sustenance

WELCOME

5 December, 2017

Dear Delegate,

We extend a very warm welcome to you for the Indian Family Office Conference 2017.

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 Aditya Birla Sun Life AMC, Edelweiss Wealth Management and Motilal Oswal Asset Management as well as our professional partner AZB & Partners.

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 Family Connect included all available speaker presentations in the workbook for delegate reference in a monochrome format.

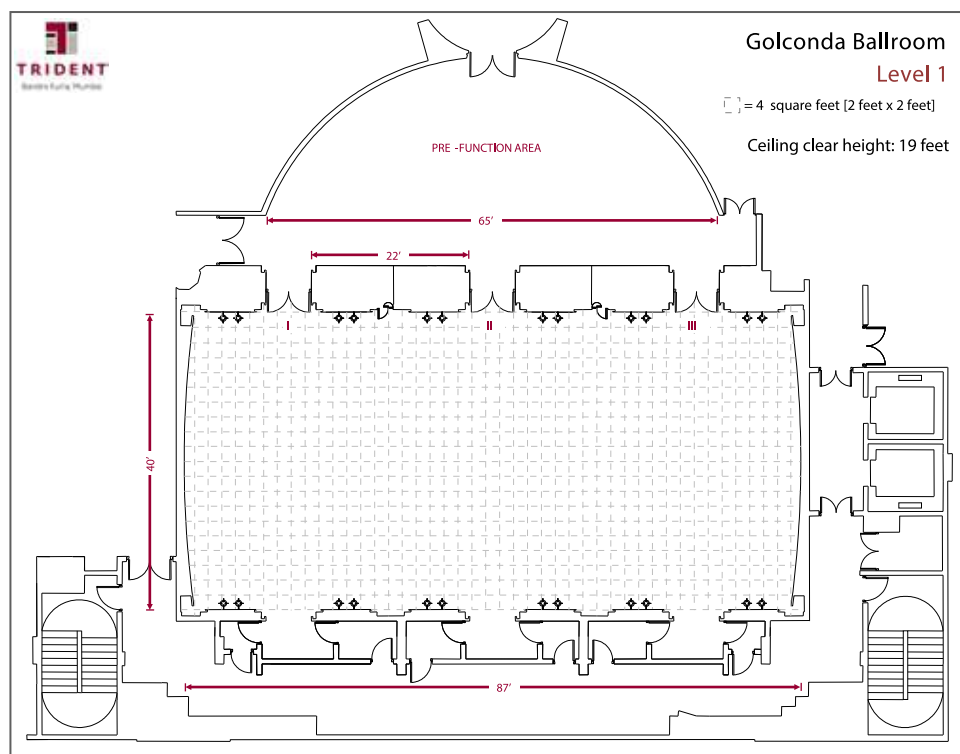
Moving forward, in order to reduce our environmental impact and deliver the latest colour versions of speaker presentations made throughout the conference, we now present them online.

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
neha@campdenfamilyconnect.com
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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 you were handed upon 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 Golconda Ballroom on both days



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 Golconda Ballroom's Pre-Function Area.



COPYRIGHT NOTICE

Campden Family Connect retains copyright on Indian Family Office Conference and all materials relating to it, unless otherwise stated.



LUNCH

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



REGISTRATION DESK AND ASSISTANCE

The registration desk will be located at Golconda Ballroom's 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 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.



VENUE

Golconda Ballroom
Trident, Bandra Kurla, Mumbai
C-56, G block, Bandra Kurla Complex,
Mumbai 400051, India

CONFERENCE PROGRAMME • DAY 1

Tuesday, 5 December, 2017

09.00 – 9.15 REGISTRATION AND REFRESHMENTS

09.15 – 9.30 OPENING REMARKS

09.30 – 10.15 **PANEL: STRUCTURING YOUR FAMILY OFFICE: A STRATEGIC PLANNING MECHANISM FOR FAMILY OFFICES**

- Structuring issues when setting up an SFO
- Structuring issues with existing SFO
- Best Structuring Practises by successful SFO

Mike Gill • Managing Partner, Gill & Co. Wealth & Family Office, UK

Moderator: Henry Samuelson • Director, Campden Wealth, UK

10.15 – 11.00 **SESSION: INDIA REFORM STORY – BOON OR BANE**

The government in office is running the country in the same way as a private enterprise does. It is keeping its ears close to ground to get feedback and course correct if required. It is taking tough measures, which by very nature inflict pain to a section of people. Is this pain worth taking? How long will this pain last? Post facto which industry or sector will drive the economy and which sector or industry will be the laggard for the economy?

A Balasubramanian • *Chief Executive Officer, Aditya Birla Sun Life AMC, India*

11.00 – 11.20 **MANAGING EQUITIES IN CORPORATE TREASURIES**

Raamdeo Agrawal • *Chairman, Motilal Oswal Asset Management, India*

11.20 – 11.40 MORNING NETWORKING AND REFRESHMENTS

11.40 – 12.10 **CASE STUDY: THE JOURNEY AND INNOVATIONS OF A EUROPEAN FAMILY OFFICE**

Rianta Capital is a sophisticated investment advisory to a family trust (SFO) with global interests and investments. Claudius Gutemann has worked within the office for 7 years and is currently involved with the office's impact investment activity known as the "Artha Initiative" in India. Claudius will share the story of Rianta since its formation in 2006 and Artha's development, as well as its mission, programming and learnings, demonstrating how to amplify impact and play a catalytic role for peers and partners.

Claudius Guetmann • *Chief Impact Officer, Rianta Capital, Switzerland*

12.10 – 13.00 **SESSION: BILLION DOLLAR LESSONS: PERSONAL ASSET MANAGEMENT AND PHILANTHROPY AS PRACTISED BY \$1B+ FAMILY OFFICE**

The Growth of an investment bank to a Financial Services Group, completing its half marathon and gunning for the next is definitely a stimulating story. This session will cover the journey of the family behind the Edelweiss Group and throw light on how they are managing wealth at the personal and professional fronts to achieve growth with a keen eye on the horizon and the right professional team to run with. It will be interesting to hear their thoughts on the succession planning of Edelweiss and how they see the involvement of their children in the business and their plans with the the social arm of the group involved in giving back to society and making a difference at the grass root level. This session will throw light on their Family Office: principles, priorities, plans and platform.

Rashesh Shah • *Chairman & CEO, Edelweiss Group, India*

Vidya Shah • *CEO, EdelGive Foundation, India*

Moderator: Noopur Desai • Nishith Desai Associates, India

CONFERENCE PROGRAMME • DAY 1

13.00 – 14.30 NETWORKING LUNCH

14.30 - 15.00 **INVEST TIME IN PLANNING FOR SUCCESSION AT THE RIGHT TIME**

Succession is an extensive process that should not be left to chance. It is never too early but can be too late. The long-term survival of family-owned businesses, and the preservation of the wealth that has been built, will depend on an early structured focus on succession planning. This session will focus on the steps that can be taken to ensure an effective succession planning at an early stage in order to ensure business continuity and maintaining of family dynamics.

Zia Mody • Partner, AZB & Partners, India

15.10 – 15.30 **GLOBAL FAMILY OFFICE REPORT 2017: 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. Formed of the advisory board and co-authors of the report, 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

15.30 – 16.15 **INTERACTIVE SESSION: TURNING GENERATIONAL CHANGE INTO SUCCESS – THE STRESSES AND OPPORTUNITIES FOR BUSINESS & WEALTH**

Generational transition in an age of complex families is an intricate web of business, emotional, legal, and technical issues. This session will explore some of the pressing issues – and conversely, the potential solutions around structuring generational transfer within a family business. You will hear specific examples and practical outcomes for addressing succession strategy, timing, and issues of capital and wealth allocation.

Abhinav Reddy • Executive Director, GAR Corporation, India

Anirudh Damani • Managing Partner, Artha Venture Fund, India

Moderator: Dilip Piramal • Chairman, VIP Industries, India

16.15 – 16.30 AFTERNOON NETWORKING AND REFRESHMENTS

16.30 – 17.15 **CIO PANEL: DEPLOYING FAMILY WEALTH IN THE NEW GLOBAL LANDSCAPE- STRATEGIC ASSET ALLOCATION**

- Asset selection, asset allocation and portfolio performance
- Proactive versus reactive investing
- The roles of direct investing in today's portfolio
- Sourcing and structuring deals
- Dynamics between Private Equity and Venture Capital
- In real estate we trust?
- Structuring Venture Capital as a part of diversification strategy

Anuj Puri • Chairman, Anarock Property Consultants, India

Gaurav Sachdeva • Managing Partner, JSW Ventures, India

Rajan Navani • Vice Chairman & Managing Director, Jetline Group, India

Moderator: Aditi Kothari Desai • Kothari Family Office, India

17.15 – 17.45 **FIRE SIDE CHAT WITH RAKESH JHUNJHUNWALA: PAST, PRESENT AND FUTURE**

Rakesh Jhunjhunwala • Partner, Rare Enterprises, India

Moderator: Mini Menon • Co-Founder and Editor, Live History, India

17.45 – 18.00 CLOSING REMARKS FOR DAY ONE

18.00 – 19.30 **COCKTAIL RECEPTION**

CONFERENCE PROGRAMME • DAY 2

Wednesday, 6 December, 2017

09.45 – 10.15 REGISTRATION AND REFRESHMENTS

10.15 – 10.30 OPENING REMARKS FOR DAY TWO

10.30 – 11.15 **INVESTING IN SOCIETY: IMPACTFUL PHILANTHROPY & STRATEGIC GIVING BY FAMILY BUSINESSES**

Family, philanthropy and business have been viewed as symbiotic in India for long now. Over the years, families have championed philanthropy and have given back to society in multiple ways. For many donors, undertaking philanthropy with their family is an important way to share significant experiences, solve for development challenges, learn together, develop a legacy, and transmit values. This panel intends to bring forth subtleties of family values, how they inspire meaningful giving and how it all culminates into life-long giving journeys. We will discuss how philanthropists started thinking about their giving, how it evolved to become more strategic and what have been some of their key challenges, learnings and successes in philanthropy.

Manasi Kirloskar • *Executive Director & CEO, Kirloskar Systems, India*

Manju Lodha • *Chairperson, Lodha Foundation, India*

Rati Forbes • *Director, Forbes Marshall, India*

Moderator: Deval Sanghavi • *Partner and Co-founder, Dasra, India*

11.15 – 11.30 MORNING NETWORKING AND REFRESHMENTS

11.30 – 12.15 **CLOSING PANEL: THINKING OUTSIDE THE BOX- INVESTING IN NON-CORRELATED ALTERNATIVE ASSETS**

- With increased globalization are there assets that are truly uncorrelated
- Do strategies really exist that can generate downside protection and generate real returns?
- What asset classes are currently trending?
- Is the hedge fund party over? If not, where are the opportunities?
- What about Renewable energy? Precious Metal? Infrastructure? Real Estate? Real Assets? Angel investing? Venture Capital?
- Can a niche within the same industry perform very differently?
- When you consider alpha, does investing in private or direct alternatives offer a premium significant enough to warrant the perceived or real risks associated with these investments?

Sasha Mirchandani • *Founder & Managing Director, Kae Capital, India*

Sajid Fazalbhoy • *Principal, Blume Ventures, India*

Sanjay Mehta • *Private Investor, India*

Moderator: Amit Patni • *Director, Raay Investments, India*

12.15 – 12.50 **CLOSING CASE STUDY: THE MODERN FAMILY OFFICE – ALLIGNING NEXT GEN VALUES & INVESTMENT IDEAS**

When looking to create a modern family office a number of complex related factors need to be considered at the outset. These include both the strategic business and investment objectives as well as the personal, family related goals. The key set-up factors include: deciding the form of the structure and desire for both tax efficiency and transparency whilst maintaining family confidentiality; agreeing the composition and role of the Family Council; and confirming the regulatory and custody status desired. Defining and aligning these different objectives early on will more easily ensure the longer term success of the new family office in an increasingly fiscally complex, transparent and volatile economic world

Radha Kapoor Khanna • *Founder, The Three Sisters: Institutional Office, India*

Rakhee Kapoor Tandon • *Co-Founder, The Three Sisters: Institutional Office, India*

Roshini Kapoor • *Co-Founder, The Three Sisters: Institutional Office, India*

Moderator: Arihant Patni • *Managing Director, Patni Financial Advisors, India*

12.50 – 13.00 CLOSING REMARKS FOR DAY TWO

CONFERENCE PROGRAMME • DAY 2

13.00 – 14.00 NETWORKING LUNCH

POST-CONFERENCE WORKSHOP

THE INDIAN FAMILY CO-INVESTMENT WORKSHOP

AN INTRODUCTION

Wednesday, 6 December, 2017

14.00 – 16.00

A highly interactive two hour workshop will bring together family principals and their next generation family members looking to co-invest with like-minded peers. The workshop will deliver exclusive case studies and co-investment best practise designed to overcome challenges while also hearing about some interesting co-investment opportunities currently available.

MAIN PARTNER



Established in 1994, Aditya Birla Sun Life Mutual Fund (ABSLMF), is co-sponsored by Aditya Birla Capital Limited (ABCL) and Sun Life (India) AMC Investments Inc.

Having total assets under management (AUM) of Rs. 2,246.49 billion for the quarter ended September 30, 2017, ABSLMF is the fourth largest Fund house in India based on domestic average AUM as published by the Association of Mutual Funds of India (AMFI). An impressive mix of reach, a wide range of product offerings across equity, debt, balanced as well as structured asset classes and sound investment performance has helped the company garner over 4.81 million investor scheme accounts as of September 30, 2017.

Aditya Birla Capital Limited (ABCL), the holding company, is a Universal Financial Solutions Provider and one of the largest financial services players in India. It is committed to serving the end-to-end financial needs of its retail and corporate customers under a unified brand — Aditya Birla Capital. Delivering a wide range of money solutions for protecting, investing and financing, Aditya Birla Capital serves millions of customers across the country.

Apart from asset management, ABCL has a significant presence across several business sectors including NBFC, life insurance, health insurance, housing finance, private equity, general insurance broking, wealth management, broking, online personal finance management and pension fund management

A Balasubramanian • *Chief Executive Officer*, Aditya Birla Sun Life AMC

He brings with him over 26 years of experience in the Mutual Fund industry as Portfolio Manager both in Fixed Income and Equity. Prior to assuming the role of the CEO in 2009, he served as Chief Investment Officer from 2006-2009. As CEO, he currently oversees more than US\$ 35 bn (as of October 2017) Assets Under Management at Aditya Birla Sun Life AMC which is the fourth largest Asset Manager in India. He also oversees global mandates through its subsidiary company in Singapore and Dubai, having assets of more than USD 3 billion (as of October 2017), apart from overseeing Alternate Investment Funds, Real Estate and PMS. A very active contributor towards taking Indian Mutual Fund industry on a high growth path, he is closely associated with key Industry Bodies. He is a member of the Mutual Fund Advisory Council set up by Indian Regulator, SEBI (Securities and Exchange Board of India). Apart from this prestigious role, he is also the Chairman of the AMFI (Association of Mutual Funds of India) Board and Director, AMFI. He is also a member of FICCI and CII Capital Market Committee. He is an AMP, IIM Bangalore and DFM in addition to BSc. in Mathematics. He is a MBA from GlobalNxt University, Malaysia. He is also a Harvard Alumni through the Advanced Management Programme.

For further information please contact:

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MAIN PARTNER



Edelweiss Global Wealth Management (EGWM) is the wealth advisory arm of the Edelweiss Group, one of India's leading diversified financial services companies. EGWM is dedicated to ensuring that clients differentiate it as the most trusted advisor in the wealth management space. The highly experienced team comprises of a diverse set of people with rich experience, not only in Wealth Management, but also in Asset Management, Investment Banking, Capital Markets, Currencies and Fixed Income. EGWM's Assets Under Advisory (AUA) have grown to INR 60,000 crores from 9,000 crores in 2014 (growing at a CAGR of 111% over the last three years); and the business currently adds over INR 1,000 crores of AUM every month.

As one of the fastest growing Wealth Management businesses in the country, EGWM boasts of helping ~4 lakh customers in their financial and personal decision-making journeys. A key differentiator that has helped EGWM gain the trust of many clients has been the ability to align with clients' interests by bringing in transparency and higher governance standards in its approach.

Vidya Shah • CEO, EdelGive Foundation

As the founder of EdelGive Foundation, the philanthropic arm of the Edelweiss Group, a leading financial services conglomerate with an asset base of \$4.8 billion, Ms Shah seeks to build a bridge between the users and providers of philanthropic capital by exporting the skills and strategies of the for-profit world to the social sector. Inspired by the notion that philanthropy is best served when organizations work collaboratively, EdelGive puts a significant amount of focus on building a tight network of nonprofits, philanthropists, foundations, and corporations to scale impact and benefit many more people in need. Ms Shah began her philanthropic journey by writing checks, like many others. However, she soon found herself traveling and personally searching for nonprofit projects in education, livelihoods and women empowerment. In 2008, she founded EdelGive, as a way to bring more structure and a more embedded approach to Edelweiss' philanthropic initiatives.

Rashesh Shah • Chairman and CEO, Edelweiss Group

Mr Shah co-founded Edelweiss in 1996, which has since evolved into an organization providing a broad range of financial products and services to a substantial and diversified client base that includes corporations, institutions and individuals. Edelweiss today has an asset base of ~Rs. 48,000 crore with more than 8,300 employees working out of more than 350 offices spread across India and overseas. The focus on innovation and passion for growth through expansion into related/ adjacent markets has been a key differentiator for Edelweiss. Mr Shah has an experience of more than 28 years in financial services. He is particularly enthused about the transformational role that financial services can play in translating India's vast savings into investments; thereby powering economic growth and development. He is also deeply involved in EdelGive Foundation. Mr Shah serves on the Boards of various companies and public institutions. He is a part of the High Level Task Force on Public Credit Registry for India as well as the Insolvency Law Committee.

For further information please contact:

Salil Thanawala
Senior Partner,
Family Office and Institutions Group
Edelweiss Global Wealth Management

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Kalina, Mumbai, Maharashtra

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Ms Vidya Shah and Mr Rashesh Shah will together discuss their journey on Tuesday afternoon. We look forward to meeting you during the course of this conference.

MAIN PARTNER



Motilal Oswal Asset Management Company (MOAMC) is one of the fastest growing asset management companies in India with one investment philosophy driving all our equity products be it Mutual Funds (MF) or Portfolio Management Services (PMS). Our endeavour has been to offer focused equity funds and PMS strategies based on our strength i.e. Equity. We inherited the equity expertise from our sponsor, Motilal Oswal Securities Limited which has 30+ years of experience in the same field. Our equity offerings have been riding on our investment philosophy, Buy Right : Sit Tight where Buy Right means buying quality companies at a reasonable price and Sit Tight means staying invested in them for a longer time to realize the full growth potential of the stocks. This philosophy has helped us become a company that has an Equity AUM of over 19,665cr across Mutual Fund and Portfolio Management Services as on 31st March 2017.

MOAMC team is steered by knowledge driven experts with 136 employees across 15 cities in India. Of which, 20 in investments and 46 in sales; which makes it a true blue investment management house focused on wholesaling through marquee distribution platforms and strong relationships, backed by consistent performance.

Raamdeo Agrawal • *Chairman*, Motilal Oswal Asset Management Company
Mr. Agrawal is the Joint Managing Director of Motilal Oswal Financial Services Limited (MOFSL) and the driving force behind the company's approach to investing. MOFSL is a well-diversified financial services firm offering a range of products and services in securities, commodities, investment banking, asset management and venture capital. As Chairman of Motilal Oswal Asset Management Company Ltd. (MOAMC), one of the fastest growing Asset Management Company in India, Mr. Agrawal has created the "QGLP" (Quality Growth Longevity & favorable Price) Investment Process and its 'Buy Right, Sit Tight' investing philosophy. Mr Agrawal is also the driving force behind the MOFSL Groups highly awarded research. He has been authoring the annual Motilal Oswal Wealth Creation Study since its inception in 1996. Mr. Agrawal is an Associate of ICAI and a member of the National Committee on Capital Markets of CII. He has also featured on 'Wizards of Dalal Street on CNBC TV 18'. In 1986, he wrote the book Corporate Numbers Game, along with co-author Mr. Ram K Piparia. He has also authored the book "The Art of Wealth Creation" which compiles insights from 21 "Wealth Creation Studies" authored by him. Mr. Agrawal has been awarded the Rashtriya Samman Patra by Central Board of Direct Taxes for a consistent track record of highest integrity in tax payments for a period of 5 years from FY95-FY99.

Mr. Agrawal will be talking about his journey of wealth creation on Tuesday morning. We look forward to meeting you during the course of this conference.

For further information please contact:

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Executive Vice President &
Head- Sales & Distribution
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PROFESSIONAL PARTNER



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 "Invest Time in Planning for Succession at the Right Time" on Tuesday 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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SPEAKER BIOGRAPHIES

Abhinav Ram Reddy

Director,
Gar Corporation,
India

Mr Reddy is a Bachelor of Science in Finance and Marketing from Case Western Reserve University, USA. He is presently engaged in managing and developing various private limited companies that are engaged in commercial real estate asset creation. He is in the process of diversifying the activities of his family's companies into new areas. Mr. Reddy has also been instrumental in creating long term partnerships with several MNC's linked to the infrastructure facilities for these IT & ITES companies. He is a Director in M/s. GAR Corporation Pvt. Ltd., and M/s. GAR Financial Services Pvt. Ltd. His flair for venture capitalism and angel investment has led to several investments into start-ups both in India and abroad. He is currently engaged in the creation of a 5 Million Square Feet IT Office development in Hyderabad, which spans a special economic zone as well and is completely owned by the company.

Aditi Kothari Desai

Executive Vice President,
DSP BlackRock Investment
Managers,
India

Ms. Kothari is the Head of Sales & Marketing at DSP BlackRock Investment Managers. DSP BlackRock Investment Managers Private Limited is a joint-venture between the DSP Group and BlackRock. She also serves as a member of the Executive and Corporate Social Responsibility (CSR) Committees. She joined DSP Merrill Lynch Fund Managers in 2002 (now DSP BlackRock) where she worked on various projects, including establishing an offshore fund for foreign investors. Today, at the helm of Marketing, she leads the Investor Education initiatives as well. She was instrumental in launching Winvestor, a special initiative aimed at empowering women with financial knowledge to plan for their economic and long-term security. Through the firm's partnership with NGOs such as Sanchayan and Parinaam, over 2000 underprivileged women have already been impacted. Ms. Kothari has also volunteered to partner with Vogue India's social awareness initiative by pledging to support the education of at least 5000 women from underprivileged backgrounds across India. She is a Trustee in the Hemendra Kothari Foundation and the Wildlife Conservation Trust. She also serves on the Advisory Board of DASRA.

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).

Anirudh A Damani

Managing Partner,
Artha Venture Fund,
India

Mr Damani's entrepreneurial journey began in 2009, when he and his two buddies took over the debt ridden Pioneer Energy Resources and restructured it to restore profitability. This marked the first successful milestone in his career. Furthermore, he spearheaded expansion into Dallas, Houston, Corpus, Christi and Mc Allen, Texas. In 2013, Mr Damani left Texas and PER to return to his home base Mumbai, India. He set up the Artha Group of Companies that focused on energy consulting and early stage investments. His keen eye and hard work helped him seek out gems like OYO, Exotel, Nowfloats, Tala, etc. Over and above the actual funding offered in an investment AIV also mentors and guides portfolio companies to build sustainable and operationally sound businesses. Mr Damani is now launching an institutional early stage fund - Artha Ventures Fund-I (Rs. 200Cr), that leverages his experience of having built Artha India Ventures. The Fund will be managed by Mr. Anirudh Damani and sponsored by Artha India Ventures and Singularity Holdings.

SPEAKER BIOGRAPHIES

Anuj Puri

Chairman,
Anarock Property
Consultants,
India

Mr Puri is an acknowledged expert on Indian real estate both in India and internationally. He enjoys strong relationships with private investors as well as local & global corporates. Until Feb 2017, he was responsible for overall direction, strategy and growth of Jones Lang LaSalle India (JLL) overseeing a team of over 9000 employees in 11 cities. He was a key member of Asia Pac Leadership Group and Head of Global Retail Leasing Board of JLL. Mr Puri recently acquired the Residential brokerage business and Fund Management vertical of JLL in India and runs them independently under his latest venture - ANAROCK Property Consultants Pvt. Ltd. As Chairman, he currently oversees a team of over 1000 across India & Dubai. With over 27 years of experience in multi-disciplinary advisory and transactions ranging from real estate to social development projects, he has expertise in planning, undertaking demand assessment studies and transactional services including marketing strategies based on technical real estate market analysis. Mr Puri has successfully handled marketing of projects within Office, Retail, Hospitality and Residential domains. His vast expertise also encompasses feasibility studies, program requirement derivation as well as fund and investor sourcing.

Arihant Patni

Managing Partner,
Patni Financial Advisors,
India

Mr. Patni founded Patni Financial Advisors (PFA) in 2004. The firm is in charge of managing deployment of assets across listed securities, debt instruments, real estate and other alternate assets in India, UK and the US. Additionally, after the sale of Patni Computers in 2011, Mr. Patni has been an active venture capitalist and directly engaged in three sector focused VC funds namely: Hive, a silicon valley 'Big Data' incubator with offices in Palo Alto, Mumbai and Bangalore, Nirvana Ventures, a fund focused on the Internet space and Idea spring Capital, a new early stage fund in collaboration with established IT entrepreneurs that will focus on enterprise technology. Lastly, he is an active angel investor, and works closely with portfolio companies.

Claudius Guetmann

Chief Impact Officer,
Rianta Capital,
Switzerland

Mr Gutemann works for the Artha Initiative. Artha is the social impact investing arm of Rianta Capital, a single family office located in England and in Switzerland. Claudius joined Rianta's Zurich office in 2010 to support the finance team. Between 2012 and 2015 he was responsible for the overall controlling and reporting function before he joined the Artha team to support the family office's impact investing activities in India. Artha's mandate is to build an impact investment portfolio in India on behalf of the family trusts it represents while helping find ways to galvanize like-minded impact investors. Mr Gutemann joined Rianta from Swisslake Capital AG, a boutique Private Equity Real Estate Fund in Pfäffikon (SZ)/Switzerland. Prior to Swisslake, Mr Gutemann worked between 2003 and 2007 for Airbus Group in Munich, Ulm and Paris in various business and project controlling positions. In addition to his work at Artha in Zurich, Mr Gutemann works in an honorary capacity on the board of a local organic food store.

Deval Sanghavi

Co-Founder,
Dasra,
India

Mr Sanghvi is an ex-investment banker who brings bold ambition to India's social sector, he co-founded Dasra in 1999. He has provided philanthropists with intelligent investment strategies resulting in over \$58 million being directed into the social sector in India. Mr Sanghvi and his team bring 18 years of knowledge and insights enabling families to become strategic philanthropists and transform India.

Dilip Piramal

Chairman,
VIP Industries,
India

Scion of the 100 year old Piramal family, Mr. Piramal's career as an independent entrepreneur began with his takeover of VIP Industries Ltd, a diversified luggage manufacturer. An erstwhile ailing company, it was turned around in three years through professional management and innovative marketing. VIP Luggage, which had a modest beginning, has today gone on to become one of the most famous Indian consumer brands. It has more than 50% market share in the organized sector. Mr. Piramal takes active interest in social and philanthropic activities. He is involved with the Piramal Education Trust in his ancestral hometown Bagar, in the State of Rajasthan. In 1987, Mr. Piramal sponsored the establishment of the Piramal Gallery at the prestigious National Centre for Performing Arts in Mumbai.

SPEAKER BIOGRAPHIES

Dominic Samuelson

CEO,
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.

Gaurav Sachdeva

Managing Partner,
JSW Ventures,
India

JSW Ventures is an early-stage technology-focused fund sponsored by JSW Group. In a career spanning more than 15 years, Mr Sachdeva has passionately led and built businesses across banking, technology and investing. Mr Sachdeva was a founding member of Corporate Finance teams at Citibank, N.A. & Bank of America and established Sales network for Infosys in Continental Europe. In his previous role at Times Group, Bennett, Coleman & Co. Limited, Mr Sachdeva invested in and managed consumer businesses in India. He is extremely passionate about the role of technology in transforming business models and building consumer experience. He managed Times Group's investments in Aegon Religare Life Insurance, IIFL, BSE and Faces Cosmetics. At JSW Ventures, Mr Sachdeva actively manages Purplelle, Indus OS and LimeTray.

Manasi Kirloskar

Executive Director & CEO,
Kirloskar Systems,
India

Sole Heir to industrialist Vikram Kirloskar's business conglomerate Ms Kirloskar is proud scion to one of India's oldest, established and most reputed business families in India. A rich and timeless legacy and a family name standing for ethics and integrity of over 130 years. Ms Kirloskar is moving up rapidly as a young business icon and entrepreneur. She underwent rigorous training at the Toyota Kirloskar Motor for 3 years and now is working with Toyota Kirloskar's Lexus Division. In addition to this she has setup the Real Estate arm and worked with her mother Mrs. Geetanjali Kirloskar to set up their Financial Services Division. At a young age of 14 she started community service which now has been registered as her own non-profit venture "Caring with Colour" thus become a social entrepreneur. She is also the Director of Kirloskar Technologies Ltd and Toyota Tsusho Insurance Broker India Pvt. Ltd.

Manju Lodha

Chairperson,
Lodha Foundation,
India

Lodha Foundation is instrumental in the functioning of various social activities like free medical check for over 150 patient's on daily basis since 2008, running 3 complimentary public libraries which contains over 4, 50,000 books for public reading, scholarships to deserving 5,500 students every year enabling them to continue their studies. Mrs Lodha is a member of Maharashtra State Animal Welfare Board since 2014, Vanvasi Kalyan Parishad and is working with Mahaveer International too. She is a Trustee at Shri Hari Satsang Samiti, the First Ladies organization of Mumbai's Marwari Ladies - Rajasthani Mahila Mandal . Mrs Lodha is an Excellent Orator and Founder of Gyan Gangotri Kavya Manch, which is the only women's literary organization for development of literary skill for housewives in Mumbai. As a writer she has written 11 Books in all. Her latest book is PARAM VIR, based on bravery stories of great Indian soldiers. book was launched by the Governor of Maharashtra. Mrs Lodha also takes care of two grand religious complex i.e Lodha Dam & Sai Vatika

Mike Gill

Managing Partner,
Gill Wealth & Family Office,
UK

Mr Gill is the 2nd Gen Family Member of a very traditional Sikh Family in the UK. He is a qualified Accountant and holds an MBA from one of the top UK Management Colleges. He is currently managing the Family Office based in Mayfair, London and its combined investment portfolio which is in excess of £1Billion. The Family Office is serving the UK family and immediate family members in Malaysia & USA. Mr Gill leads the house team managing the RE development portfolio and use a number of outsourcing consultants for specialist investment activities. The family has heavily invested into the FinTech space over the past 5 years with some real significant returns and developing new technology with a number of programmers to improve robotic algorithm trading within the FX markets.

SPEAKER BIOGRAPHIES

Mini Menon

*Co-Founder & Editor,
Live History,
India*

Ms Menon is an award-winning journalist and author. She is currently the Co-Founder and Editor at Live History India. Live History India is a result of her fascination for India and its History. Live History India is an ode to the billion fascinating stories that make India. Ms Menon was formerly the Executive Editor of Bloomberg TV India, where she was in charge of news and features shows. She has also reported on political, economic and business news. She has won awards for her work as a news anchor and journalist. In 2013 she was adjudged as one of the 10 most influential women in Indian Marketing, Advertising and Media by Impact magazine and was also called a "popular face on Indian news television" by The Times of India. She was judged the best business news anchor by the Indian Broadcast Federation, Zee Astitva Award for Journalism, Rajiv Gandhi award for Excellence.

Radha Kapoor Khanna

*Founder,
Three Sisters:
Institutional Office,
India*

Ms Khanna wears more than one hat in her professional endeavors with diverse interests driven by her creative passions. TTS:IO is one of the few institutionally organized family offices in India formed with a stated objective of centralizing investment management, philanthropy and legacy sustainability. She is the first Parsons alumnus to have collaborated with the school to set up the Indian School of Design and Innovation in association with Parsons, New York, in 2013, in Mumbai. She also set up ISDI ACE in a partnership with Microsoft Ventures to foster the start-up ecosystem in India, in 2015. With innovation and start-ups thriving in the Indian economy Ms Khanna had the breadth of view to establish LPID, i.e the Lower Parel Innovation District, a burgeoning district in Mumbai, aiming to boost economic activity by building an urban network and platform that fosters innovation, collaboration and entrepreneurship. Her recent ventures are as follows Awfis, DOIT Retail – Ms Khanna tied up with the iconic French luxury brand Longchamp, Paris and R-Directed a creative digital platform which curates global content on Design, Innovation and Creativity and Entrepreneurship (DICE) with an Indie focus.

Rajan R Navani

*Vice Chairman &
Managing Director,
Jetline Group of Companies,
India & USA*

Mr Navani is the Vice Chairman & Managing Director of the Indian arm of the Jetline Group of Companies with interests in packaging manufacturing, IT services, digital media and new ventures in innovative entertainment and organized consumer retail. With a large vision to play a key role in the digital lives of 1.2 billion Indians, the group has recently made significant investments and is building businesses in powering varied consumer facing digital platforms, products and services in areas including next generation digital media, entertainment, gaming and sports with a deepened technology focus on Artificial Intelligence led big data analytics through its group company Jetsynthesys with operations in India, MENA, SE Asia and USA. Mr Navani is responsible for the India strategy and its implementation for all the group companies. The roots of the Navani group originate back to the 1930's in Bangkok, Thailand where the group continues to have its diversified business operations.

Rakesh Jhunjunwala

*Partner,
Rare Enterprises,
India*

Mr Jhunjunwala's name is a synonym to stock investment. Such is the credibility of his name that his one word, sometimes even a hint, can turn the market upside down. There is a reason why investors swear by his "look before you leap" philosophy. A journey that started with Rs 5,000 and has reached whopping 13,000 crores. Today, Mr Jhunjunwala is referred to as India's most successful and a legendary stock market investor. He is also known as Indian warren buffet and king of the dalal street. He manages his own equity portfolio as a partner in asset management firm Rare Enterprises. Rakesh currently is the chairman of Aptech Limited and Hungama Digital Media Entertainment Pvt. Ltd. and sits on the board of directors of various Indian companies such as Prime Focus Limited, Geojit BNP Paribas Financial Services Limited, Bilcare Limited, Praj Industries Limited, Provogue India Limited, Concord Biotech Limited, Innovasynth Technologies (I) Limited, Mid Day Multimedia Limited, Nagarjuna Construction Company Limited, Viceroy Hotels Limited and Tops Security Limited.

Rakhee Kapoor Tandon

*Co-Founder,
Three Sisters:
Institutional Office,
India*

Ms Tandon is the Founder & CEO of ART Capital a financial services holding company. Under the umbrella of ART Capital, Ms Tandon has founded / incubated ventures focused on Retail / Consumer and MSME / Business financing. One of such ventures is ART Affordable Housing Finance (India) Pvt. Ltd, a company that is engaged in providing mortgage finance to retail customers in the affordable segment. Her latest venture is the Indian School of Management & Entrepreneurship (ISME), Midtown Mumbai's foremost institution of Entrepreneurial Studies. She has also recently launched ISME ACE, which is an accelerator program focused on providing host of benefits to FinTech Startups including seed funding of \$100-150k gross, access to financial services partner firms, focused mentorship, marketing and technology support. Currently, Ms Tandon is the Member on the Committee of the Young FICCI Ladies Organization (YFLO), New Delhi. Additionally, she is very active in her alma mater alumni organization and co-founded the Penn Club of Delhi in 2013. She is also on the Board of Trustees of The Three Sisters' Foundation, a not-for-profit organization that works towards educating and empowering the girl child.

SPEAKER BIOGRAPHIES

Rati Forbes

Director,
Forbes Marshall,
India

Ms Forbes has been a Director at the Forbes Marshall group of companies since 1992; and has been involved in overseeing the Human Resources function till four years ago. During this time, Forbes Marshall has been thrice selected as one of India's Top 25 Great Places to Work by the Great Places to Work institute. Today, Ms Forbes focuses full time on the social initiatives the company has developed and grown, over the last several years. She also heads the Foundation which FM set up. She has initiated several programmes for under-privileged women and children from neighboring communities. The social initiatives team at FM is involved with varied programs. FM was recognised by the Social audit network of UK and awarded a certification after a rigorous process in 2010. Ms Forbes is also on the board of companies as an independent director as well as serving on Foundation Boards - some of them are the advisory board for Akanksha Pune, Centre for Learning Resources, Centre for Advancement of Philanthropy, the Business Community Foundation etc.

Roshini Kapoor

Co-Founder,
Three Sisters:
Institutional Office,
India

Ms Kapoor is the founding member of The Three Sisters: Institutional Office and ART Capital Group, a Mumbai based financial services holding company primarily into making strategic investments in new-age, tech-led, scalable and innovative businesses. Ms Kapoor is committed to creating and fostering new ventures, building comprehensive organisations driven by innovation and creativity with an Owner-Manager-Partner ethos and establishing synergies between various ventures under TTS:IO and ART Capital group canopy. She has also been instrumental in setting-up of a sector agnostic, mid-cap fund christened Seven Rivers Capital in 2016. Ms Kapoor's fervor towards society is reflected by her association with YES Foundation, wherein as a part of the launch team, she helped conducting workshops to create awareness of "YES! I am the change", a 101 hour film-making challenge to encourage and empower youth in India, organised counseling sessions for female physical and mental abuse victims and assisted in their rehabilitation and also participated in a Microfinance Lending Pilot Project for unbanked slum population.

Sajid Fazalbhoy

Principal,
Blume Venture Advisors,
India

Mr. Fazalbhoy serves as a Principal at Blume Venture Advisors and Blume Ventures. He joined in April 2012. He lends his experience of technology and operating management to the funds portfolio companies. Mr. Fazalbhoy is also the Founder of Amedeo Software. Apart from being associated with venture capital, he is also an angel investor and has invested in his personal capacity in multiple companies. Mr. Fazalbhoy was instrumental in growing the business and engineering a part exit to some of Amedeo software customers. He is currently training to obtain his private pilots license. He looks at scouting exciting teams that solve large disorganized problems, predominantly India centric. Consumer and B2B businesses are companies that he looks at. He has completed Executive Education courses at the Indian School of Business in 2011, Bachelor of Business Administration in International Business from the Regents Business School London in 2002, and Bachelor of Business Administration in International Business of the European Business School, London in 1999.

Sanjay Mehta

Private Investor,
India

Sanjay Mehta is a Private Investor. Since 1993 he has been a technology entrepreneur with 2 successful exits, first one was a tax software product company, second one was in business intelligence & data analytics. Since 2011 he has been an investor in private equity, startups & from 2015 investing in cryptocurrencies. He has been an early investor in Initial Coin Offerings (ICOs). He is evangelizing globally on topic of disruption with decentralized economy by open source organization using blockchain. He has portfolio of 70+ startup companies. He was voted & honoured as Angel Investor Of The Year 2017 by Let'sVenture. He helps large corporations to build startup investment thesis, founder hiring strategies & setup model for innovation on hire with technology assessment. He is an early investor in Block.one publisher of world's first blockchain operating system. He is also Independent Director Of Board on Public Listed Company ABM Knowledgeware Ltd, Director on CORE Media, TiE Mumbai Board Of Trustees.

Sasha Mirchandani

Managing Director,
Kae Capital,
India

Mr Mirchandani is the Managing Director and Founder of Kae Capital and Co-founder Mumbai Angels. Previously, he was at Blue Run Ventures as Managing Director for the India operations. Before joining Blue Run Ventures he was CEO and Founder of Imercius Technologies, a BPO focused on the healthcare space. Earlier he was at Mirc Electronics (Onida) where he was Head of Corporate Affairs and new business. His investments include Fractal Analytics, Inmobi, Healthkart, Myntra, Greendust, Cloudbyte, Canvera and Mettl. Mr Mirchandani sits on the Boards of Hathway Cable and Datacom Limited, Ador Welding and Mumbai Angels Venture Mentors among others. He completed his Business Administration from Strayer University and MMDP program at IIM, Ahmedabad. He is a Charter Member at TiE Mumbai. He is also Past President of Entrepreneurs Organisation (EO) Mumbai and is a member of the Mumbai Chapter of the Young Presidents Organisation (YPO). He is also on the Board of Governors of the Universal Business School.

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