PRIVATE MEETINGS FOR THE WORLD'S LEADING FAMILIES

THE INDIAN FAMILY OFFICE CONFERENCE 2019

22 & 23 October 2019

Trident, Bandra Kurla Complex • Mumbai, India

Progression of Family Offices

An annual forum dedicated to significant Family Business Owners, their Family Offices, NextGen Family members and Large Private Investors

Main Partners:

EDELWEISS GLOBAL WEALTH & ASSET MANAGEMENT

DLF LTD

Professional Partner:

AZB & PARTNERS

Supporting Partners:

INSTITUT AUF DEM ROSENBERG

DIT - BRITISH HIGH COMMISSION

Organised by:

Campden Family Connect

Membership | Events | Research | Education

A Patni family & Campden alliance

In affiliation with:

Campden Wealth

Events | Publishing | Research | Education | IPI

www.campdenfamilyconnect.com

THE INDIAN FAMILY OFFICE CONFERENCE 2019

Progression of Family Offices

WELCOME

Dear Delegate,

It is a pleasure to host you at our annual Indian Family Office Conference 2019. I thank you for your participation and hope you find the conference to be informative and worth your time. We have a 1.5 day 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 the proceedings as informal as we can, with each session having time set aside for questions and discussions.

We would like to thank our Main Partners - **Edelweiss Global Wealth and Asset Management** and **DLF Ltd.**, our Professional Partner - **AZB & Partners** and our Supporting Partners - **Institut Auf Dem Rosenberg** and **DIT - British High Commission** who have assisted in planning this event.

Today, Campden globally has delivered over **320 events** hosting **24,000 families** and has built a trusted reputation of delivering exclusive private forums that are led by families, for families, on families all throughout the globe i.e. **Asia, Europe, US, and the Middle East**. As we have grown to a **1400 global community across 37 countries**, we would like to thank our esteemed Members for their over-whelming response and support and continually believing in our offering.

As we strive to deliver unrivalled knowledge, your valuable feedback is critical to help us further refine the quality of the forum

Should you require any assistance concerning the conference, please do reach out to any member of the Campden Family Connect team as the event unfolds.

We wish you an enjoyable and stimulating conference ahead.

Yours faithfully,

Amit Patni
Director
Campden Family Connect

Dominic Samuelson
Chief Executive Officer
Campden Wealth

ADMINISTRATIVE NOTES

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

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

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

FEEDBACK FORM
We are going digital. Please contact any member from the Campden team who will be happy to record the same from you. Your comments will be helpful to us in planning future events.

THE CONFERENCE VENUE
The main conference will be held at Orloff & Cullinan, Level 2

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 at the Pre-Function Area of Orloff & Cullinan

LUNCH
Lunch will be held at Pre-function area of Orloff & Cullinan, Level 2

REGISTRATION DESK AND ASSISTANCE
The registration desk will be located at the Pre-Function Area of Orloff & Cullinan. 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 anyway 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 chairperson. 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
Orloff & Cullinan, Level 2
Trident BKC
Mumbai

CONFERENCE PROGRAMME DAY 1

Tuesday, 22 October 2019

9.00 – 9.30 **REGISTRATION AND REFRESHMENTS**

9.30 – 9.45 **OPENING REMARKS BY CHAIRPERSON**

Devendra Surana • Surana Group

9.45 – 10.15 **KEYNOTE: INDIAN ECONOMIC OUTLOOK**

The economy of India is ranked among the world's fifth-largest economy by nominal GDP and the third-largest by purchasing power parity (PPP). However, is this growth sustainable? If yes, till when? This session will analyse the outlook of Indian economy over the next five years.

Rajni Thakur • *Economist,* **RBL Bank**

10.15 – 11.00 **SPOT LIGHT ON INDIAN FAMILY OFFICES IN 2019**

This session will trace the evolution of the family offices - inception, journey and transformation- over the last 5 years and look forward to what the next 5 years have in store:

– Where does India stand against its global counterparts in terms of Family Office Services?
– What is the purpose of the family office and how long-term is their outlook?
– Balancing family heritage, history and values with the changing world

Moderator: **Ritesh Mehta,** *Senior Partner - Family Office & Institutions Group*, **Edelweiss Global Investment Advisors**

Abhishek Goenka • *Chief Executive Officer,* **RMZ Family Office**
Ashvini Chopra • *Sr. Vice President,* **Bennett & Coleman**
Harsh Dhanuka • *Chief Investment Officer,* **SAR Group Family Office**
Shridhar Narayan • *Group Director & Chief Investment & Strategy Officer,* **Hiranandani Group**

11.00 – 11.30 **NETWORKING AND REFRESHMENTS**

11.30 – 12.15 **ASSET ALLOCATION AND RISK MANAGEMENT: BUILDING A PROGRESSIVE PORTFOLIO**

As families have to make their money work harder to achieve the returns they seek, allocation and investment strategies have evolved. What are some of the leading families doing and how are they getting it more right than wrong? This session will draw the similarities and differences in the allocation strategies of Indian Families and the rest of the world.

Moderator: **Kunal Giri,** *Senior Partner - Family Office & Institutions Group,* **Edelweiss Global Wealth Management**

Abhinav Reddy • *Director,* **GAR Corp**
Anirudh Damani • *Managing Partner,* **Artha Venture Fund**
Christopher Aw • *Managing Partner,* **Pandan Ventures**
Markus Lehner • *Principal,* **Markus Lehner Family Office**

CONFERENCE PROGRAMME DAY 1

Tuesday, 22 October 2019

12.15 – 13.00 **SUSTAINABLE LUXURY**

Sustainable luxury is the future. This session will cover it's necessity and how firms need to invest resources and time towards the same. Protection of environment and ecology must be a fundamental part of a responsible brand's agenda.

Aakash Ohri • *Senior Executive Director - Business Development,* **DLF Home Developers Ltd.**

13.00 - 14.40 **NETWORKING LUNCH**

14.40 - 15.10 **REPORT ANALYSIS: GLOBAL FAMILY OFFICE REPORT 2019**

A presentation of the key findings and learnings from the 6th edition of the Global Family Office Report

Dominic Samuelson • *Chief Executive Officer,* **Campden Wealth**

15.10 - 15.25 **NURTURING CREATIVITY IN TODAY'S EDUCATION**

Manuel Bernardo • *Head of Relationship Management, Admission & Communication,* **Institut auf dem Rosenberg**

15.25 – 16.00 **NETWORKING & REFRESHMENTS**

16.00 - 16.20 **INTERNATIONALIZE YOUR FAMILY OFFICE-THE UK EXAMPLE**

This session will focus on the thought leadership and trends in the international diversification of family offices and why UK is the most sought after location for family offices to grow.

Crispin Simon • *British Deputy High Commissioner for Western India & HM Trade Commissioner, South Asia,* **Department for International Trade**
Philip Sydenham • *Deputy Director, Investment and Marketing,* **Department for International Trade**

16.20 – 17.00 **KEYNOTE: SEEING BEYOND MONEY - THE FAMILY SIDE OF YOUR BUSINESS**

Family businesses are often guided by the founder's legacy. This gives the business its soul, heart and uniqueness. How do we respectfully build on the legacy to lead a business geared for the future, without destroying the family tradition? This session will give you tips and insights on how to prevent future family feuds and disputes that can only end in court and destroy your business and subsequently the family.

Philippe J. Weil • *Founder & Family Office Principal* , **P.J Weil Ltd.**

17.00 - 17.15 **CLOSING REMARKS BY CHAIRPERSON**

17.30 - 20.00 **COCKTAIL RECEPTION AT O22, LOBBY, TRIDENT BKC**

CONFERENCE PROGRAMME DAY 2

Wednesday, 23 October 2019

08.30 – 9.30 **REGISTRATION AND REFRESHMENTS**

9.30 – 9.45 **OPENING REMARKS BY CHAIRPERSON**

Abhishek Goenka • *Chief Executive Officer,* **RMZ Family Office**

9.45 – 10.15 **KEYNOTE: CHANGING TAX LANDSCAPE OF INDIA- WHAT FAMILIES NEED TO BE AWARE OF**

India is moving at a rapid pace on the path of economic growth and the Indian tax landscape has witnessed various changes in the recent past. The Indian government has been steadily working towards widening the tax base, addressing the menace of the parallel economy, improving the ease of doing business and strengthening the anti-abuse provisions. This session will analyse what does the new tax regime mean to the Families.

Rishab Sawansukha • *Tax Expert and Founder,* **GST Street & BizStreet**

10.15 – 10.45 **LRS - REGULATING THE CAPITAL FLIGHT OF WEALTH-HOLDERS**

In 2004, the Reserve Bank of India (RBI) introduced the Liberalised Remittance Scheme (LRS) which allowed Indian residents to remit up to USD 25,000 abroad, without seeking specific approvals. The RBI gradually extended this limit over the years to USD 250,000, last being in May 2015.This session will cover the do's and don'ts of remitting money abroad and also structures and vehicles that one may use to remit Indian funds abroad.

Anand Shah • *Partner,* **AZB & Partners**

10.45 – 11.15 **ART OF INVESTING IN ART AND ARTEFACTS**

Art is an investment with both financial and social impact. Traditionally, art prices go up with time but not everything collected is subject to this monetary gain. It is important to understand that while prices of art and artefacts seem to be arbitrary, it is not so. They are based on a number of factors that contribute to their real value. This session will analyze what makes an investment in art and other collectibles a great opportunity to grow wealth for the family.

Ashvin E. Rajagopalan • *Director,* **Piramal Museum of Art**

11.15 – 11.45 **NETWORKING AND REFRESHMENTS**

CONFERENCE PROGRAMME DAY 2

Wednesday, 23 October 2019

11.45 – 12.45 **Interactive Round-table Session**

1. Family Office: Starting from scratch
   - Is there a right time to set-up a family office
   - SFO/ MFO - cost of setting up a Family Office v/s outsourcing
   - Services offered by a Family Office

Chair: **Amit Patni** • *Founder & Director,* **RAAY Global Investments**

2. A guide to investing in start-ups
   - Best industries to bet on going forward
   - Accessing and evaluating deals

Chair: **Anirudh Damani** • *Managing Partner,* **Artha Venture Fund**
Steven Hirth • *Founder & Principal* , **S. H. Hirth & Associates**

3. Estate planning / Inheritance tax
   - Estate planning v/s will
   - Tax implications on the inheritor

Chair: **Shreya Rao** • Co-Head, Private Client Practise , **AZB & Partners**

12.45 – 13.00 **Closing remarks by Chairperson**

Rounding-off Day 2 and the IFOC 2019 conference, the closing remarks will give unique insights on the outlook for SFOs, the paradigm shift in investment strategies, global investment opportunities, tax landscape and other key insights from the Round-table discussions.

13.00 - 14.30 **Networking Lunch**

14.30 - 17.00 **Co-Investment Workshop**

Exclusive for Campden Members and pre-registered delegates

THE INDIAN FAMILY CO-INVESTMENT WORKSHOP

Chair: **Jai Rupani** • *Chief Investment Officer,* **Dinesh Hinduja Family Office**

EXCLUSIVE FOR CAMPDEN MEMBERS ONLY,
PRE-REGISTRATION COMPULSORY FOR NON MEMBERS

A highly interactive workshop bringing together Family Principals and Private Investors looking to co-invest with like-minded peers. The workshop will deliver exclusive case studies and co-investment best practices designed to overcome challenges while also hearing about some interesting co-investment opportunities currently available.

MAIN PARTNER

The Edelweiss Group is one of India's leading diversified financial services company providing a broad range of financial products and services to a substantial and diversified client base that includes corporations, institutions and individuals. Edelweiss' products and services span multiple asset classes and consumer segments across domestic and global geographies. Its businesses are broadly divided into Credit Business (Retail Credit comprises of Retail Mortgages, SME and Business Loans, ESOP and Margin Financing, Agriculture and Rural Finance, Corporate Credit comprises of Structured Collateralised Credit to Corporates, Wholesale Mortgages, and Distressed Credit), Advisory Business (Wealth Management, Asset Management, Asset Reconstruction and Capital Markets) and Insurance (Life and General Insurance). Edelweiss has a Balance Sheet of INR 53,932 cr, as of 31st March, 2019. The Group had a revenue of INR 10,886 cr and PAT of INR 995 cr for FY19.

Ritesh Mehta

Senior Partner - Family Office & Institutions Group

Edelweiss Global Investment Advisors

Ritesh Mehta has played several key roles at Edelweiss, his most recent as Senior Partner - Family Offices and Institutions Group at Edelweiss.

Ritesh has more than a decade of experience in the financial services arena. He joined Edelweiss in 2006 as part of the Global Markets business, the proprietary investment arm of the group. Having led multiple teams successfully across the Strategic Business Unit, he has been a key member of the Edelweiss growth journey. He has expertise in investing across multiple asset classes, spread across sectors, running multiple trading and investing strategies. He has been instrumental in expanding the group's business across geographies while managing teams in diverse locations.

Leveraging his skills at building and maintaining large institutional relationships, he currently plays a pivotal role in the Family Office business and has contributed significantly in the scale up of the business, now close to a USD 5 Bn Assets under Advisory.

Ritesh has a Masters in Business Administration with a dual specialisation in Finance and Marketing, and a Bachelors in Engineering from Mumbai University.

For further information please contact:
Salil Thanawala, Practice Head
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Phone : +91 98673 87140 Email: Salil.thanawala@edelweissfin.com Web: www.edelweissfin.com

MAIN PARTNER

The Family Office group at Edelweiss is an independent platform which focuses on the long-term sustainability of the family values, wealth and business. This is achieved by a whole host of services driven by a common goal which is defined by the family charter. These services include succession planning, investment management, new business advisory, estate services, risk management, next-gen mentorship and philanthropy. The group focuses on preserving and growing the family wealth while keeping the key family values intact.

The 4 cornerstones of the our Family Office that enable us to do this are :
1. Our wide internal and external Platform & Partnerships
2. Exceptional quality of People
3. Open architecture which allows transparency
4. Risk-focus ensuring maximisation of capital efficiency

Our objective is to connect with families on the deepest level and help them manage their legacy in a more sustainable manner.

Kunal Giri

Senior Partner - Family Office & Institutions Group

Edelweiss Global Wealth Management

Kunal joined Edelweiss in 2015 and is currently a Senior Partner in Wealth Management business. He works with Family Offices and entrepreneurs across India to deliver investment and business solutions.

He has over 14 years of industry experience, primarily in Financial Services, and brings with him expertise in international markets owing to his earlier stint with Fidelity Investments (USA) and SAP Americas (USA).

Kunal has done his MBA (Finance) and MS (Information Systems) from Boston University. He graduated from Birla Institute of Technology with a degree in Business Administration.

For further information please contact:
Salil Thanawala, Practice Head
Edelweiss Family Office and Institutions Group, 6th Floor, Off CST Road, Kalina, Mumbai, Maharashtra
Phone : +91 98673 87140 Email: Salil.thanawala@edelweissfin.com Web: www.edelweissfin.com

MAIN PARTNER

With a legacy of over 72 years in creating exceptional living and working spaces for the new Indian global professionals, today, DLF is the largest publicly listed real estate company in India, with residential, commercial and retail properties in 24 cities across 15 states. DLF has an unparalleled scale of over 27.8 million square meters of delivery and an unmatched track record of customer-centric service excellence in India.

While being recognized as developers of excellence, ours is a new, more thoughtful take on luxury. We insist on being led by our conscience as corporate citizens and creating not only exceptional living spaces that are in balance with their environments, but also communities that support their residents holistically. A befitting example is our flagship master-planned development - DLF5, which is the pinnacle of cosmopolitan living in the millennium city, Gurugram.

Spread across close to 500 acres, DLF5 is a self-sustaining ecosystem offering high-end residential, commercial, retail and community facilities. DLF5 is a very strong community of over 30,000 residents, across 14 condominiums and features numerous choices to live, work and play luxuriously. Master-planned across 4 enclaves, consisting of Club Drive, Park Drive, Horizon Drive and Golf Drive, with each boasting unique features and character of their own, DLF5 builds a new Indian utopia with an unmatched living experience of global standards for its residents.

DLF5 has always been at the forefront of sustainability initiatives and preservation of trees. With an exemplary horticulture team DLF5 prevented 300 mature trees from cutting down by transplanting in DLF Golf and Country Club. A recent notable achievement has been when DLF5 took the voluntary initiative to transplant 74 mature trees being cut by NHAI in a road widening project in another part of the city.

Aakash Ohri

Senior Executive Director - Business Development

DLF Home Developers Ltd.

Aakash has been spearheading Sales and Marketing, pan India of commercial and residential properties, relationship with Regulators, DLF Golf & Country Club, DLF's most luxurious township in India- Dlf5 , for over a decade now.

He is an avid golfer and an advocate of eco-friendliness and sustainability. Under his leadership, DLF built the award winning Gary Player course in DLF5, wherein many milestones were achieved. Not only was the project successfully completed in record time, DLF created history by successfully transplanting over 300 mature trees in DLF5. This has been one of the largest tree transplantation exercises in South East Asia.

He is a General Management Program graduate from Harvard Business School, USA and also holds a Master's Degree in International Business from Nottingham Trent University, UK. He has won numerous awards for Excellence in Golf Business Management, and has been recently awarded as the 2018 Asia Pacific Personality of the Year.

For further information please contact:
Kirti Prakash, Vice President - Sales
DLF Limited, The Camellias, Golf Drive, DLF -5 Gurugram – 122009 Haryana, India
Mobile: +91 – 9320067819 Email: prakash-kirti@dlf.in Web: www.dlf.in

PROFESSIONAL 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.

Anand Shah

Senior Partner

AZB & Partners

Anand also co-heads the Private Client Practice wherein he regularly advises promoter families on succession planning, family arrangements and restructuring of promoter holdings across group organisations. Apart from private client matters he also covers a range of practice areas including Corporate, M&A, Banking & Finance, Aviation and Private Equity. He contributes to the Private Client Practice at AZB with his in-depth knowledge in the field of corporate law, SEBI regulations, trust law, real estate law - all crucial in family re-organisations and structuring promoter holding. He is a qualified Indian solicitor and a graduate of Government Law College, Mumbai.

Shreya Rao

Co-Head, Private Client Practise

AZB & Partners

Shreya Rao is recognised for her work in private client and tax law by reputed directories such as the Chambers & Partners surveys. She advises promoter families, HNIS and their institutions on a range of issues including the structuring of inter-generational wealth transfers through trusts and wills, international private client requirements, luxury assets and family governance structures. Shreya holds an LL.M. from the Harvard Law School and is a graduate of the National Academy of Legal Studies & Research, Hyderabad.

For further information please contact:
Anand Shah, Senior Partner
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SUPPORTING PARTNER

INSTITUT AUF DEM ROSENBERG

THE ARTISANS OF EDUCATION®

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

Manuel Bernardo

Head of Relationship Management, Admission & Communication

Institut auf dem Rosenberg

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
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SUPPORTING PARTNER

The Department for International Trade (DIT) secures UK and global prosperity by promoting and financing international trade and investment, and championing free trade.

DIT's Growth Capital team can provide a complimentary bespoke service that helps facilitate investment to the most exciting and innovative UK led companies. As the UK is at the forefront of innovation, companies within the UK hold substantial growth and profitability potential. Our teams work intimately with these companies across most sectors, a majority of which the UK is a global leader in; meaning we have direct access and contact. Our market and sector specialists are at the heart of the provision of this service, holding extensive industry experience and an intimate understanding of the UK market, providing excellent insight and sector specific knowledge. These specialists build investment portfolios tailored around specific interests, investment criteria and global trends, cutting through all the white noise and hassle of sourcing valuable investment opportunities. This includes companies in leading sectors such as Artificial Intelligence, DeepTech, Renewable Energy, Food and Drink, Fashion, Luxury and Retail, Healthcare, Life Sciences, Fintech, Financial Services, Education, Manufacturing and Creative/Media.

Crispin Simon

British Deputy High Commissioner for Western India & HM Trade Commissioner, South Asia

Department for International Trade

Mr Simon has responsibility for all aspects of diplomatic engagement in Maharashtra, Madhya Pradesh and Goa. As HM Trade Commissioner for India and South Asia, he will lead on delivering a strong and vibrant trade and investment relationship across India and the rest of South Asia.

Crispin Simon comes to India from the UK with extensive leadership and commercial experience across both the private and public sectors. After initial spells with NM Rothschild, McKinsey, Bowater and Smith and Nephew, Mr Simon spent 20 years as Chief Executive of medical technology companies operating in the fields of cardiology, cancer and neurological rehabilitation. He was formerly a non-executive director of two NHS organisations- Trust Development Authority and Imperial College Healthcare NHS Trust. Mr Simon has also been a trustee of Alive and Kicking, a registered charity manufacturing and donating footballs in Africa.

Philip Sydenham

Deputy Director Investment & Marketing India

Department for International Trade

Philip heads the UK Government's investment promotion and commercial marketing teams across India and South Asia. Prior to this, Philip was Acting Head and Senior Manager in the Growth Capital team at the Department for International Trade, where he promoted UK partnerships and investments to overseas venture capital and individual investors, particularly in the Middle East.

From 2012 to 2016 he was Deputy Head of Trade and Investment for the Western Region of India, based in Mumbai culminating in the major business event of TRH the Duke and Duchess of Cornwall's visit to India and initial planning for the 2016 UK-India Tech Summit. He started in the civil service working on Europe-focused roles in the Department for Business Innovation and Skills.

Philip graduated in languages from the University of Nottingham and completed postgraduate studies in history and international relations at the London School of Economics.

For further information please contact:
Anuj Kumar, Senior Investment Manager, Growth Capital Investment
DIT British High Commission, Department for International Trade | Shantipath, Chanakyapuri | New Delhi 110021
Phone : +91 11 2419 2550 Mobile: +91 72900 91918 Email: anuj.kumar2@fco.gov.uk www.gov.uk/dit

SPEAKER BIOGRAPHIES

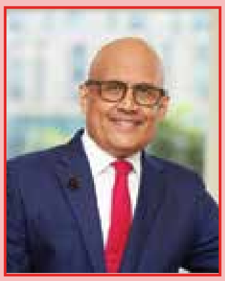
CHAIRPERSONS:

Devendra Surana

Surana Group

Devendra Surana is an Industrialist, Economist and an Entrepreneur. As the 2nd gen of the Surana Family, Devendra joined the family business in 1988 and heads the flagship company - Bhagyanagar India Limited. He is also the Director of Surana Ventures Limited and Surana Group of Companies. Founded in 1978, Surana Group of Companies, with a turnover of Rs. 350 crore, is now one of the country's leading industrial houses with a focus in copper, automotive and solar panels.

An active philanthropist, Devendra has adopted Bolarum, a major locality in the city of Secunderabad, for community activity, wherein he started a library, Community Hall and a Charitable Clinic - Gulabchand Surana Charitable Hospital.



Abhishek Goenka

Chief Executive Officer,
RMZ Family Office

A qualified chartered accountant, Abhishek Goenka, is the CEO of RMZ Family Office and CoWrks. He is also the CIO at CoWrks Foundry.

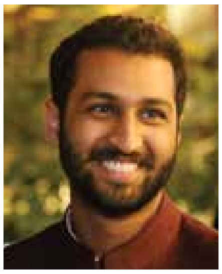
Abhishek has previously been associated with PwC and BMR, where he was actively engaged in advising families in setting up a governance framework and also on succession planning. With a domain expertise in real estate and Prop-Tech, Abhishek has also assisted promoters of some of the largest listed companies in Bangalore in moving to a Trust holding structure, including dealing with cross border issues

Jai Rupani

Chief Investment Officer,
Dinesh Hinduja Family Office

As the CIO of the Dinesh Hinduja Family Office, he oversees investments across all asset classes for the group: real estate, stocks, bonds, structured products, private equity and venture capital. He also has primary responsibility for Gokaldas Lifestyle, a real estate development company focused on luxury projects. He has completed his formal education in Finance and Real Estate at the University of Michigan, Ann Arbor and the University of Texas at Austin in the United States.

SPEAKER BIOGRAPHIES



Abhinav Ram Reddy

Director,

GAR Corporation India

Abhinav Ram Reddy is the second-generation owner of GAR Corporation Pvt. Ltd – a leading Hyderabad based office parks asset creator. He is presently engaged in managing and developing various private companies that are in the business of commercial real estate.

His flair for venture capitalism and angel investment has led to several investments into start-ups both in India and abroad. Abhinav actively invests in a portfolio of start-ups as a member multiple angel networks, as well as being a partner and investment committee member of a SEBI registered venture capital fund.

Abhinav is an alumni of Harvard Business School.

Amit Patni

Founder & Director,

RAAY Global Investments

A 3rd Gen member from the Patni Family, who were the pioneers in establishing Family Offices as early as 2000s,Amit Patni is the Founder & Director of RAAY Global Investments (Single Family Office), Director at Raay Foundation,Co-founder & Chairman at Nirvana Venture Advisors, Co-Founder and Partner in The Hive-India, Director and Investor in Waterfield Advisors.

Amit also spearheads Campden Family Connect's business in India, focusing on growth and strategy of the firm in the country.

Anirudh Damani

Managing Partner

Artha Venture Fund

Anirudh has been an angel investor in India since 2011, prior to which he was an entrepreneur in the energy sector in the US and in India. Anirudh strongly believes that investing in start-ups at an early stage creates the maximum impact in their lifecycle.

Anirudh's unique funding strategy has helped him create an impressive portfolio of over 50 start-ups that are almost completely funded by a renewable energy asset in Rajasthan. His knack for picking winners is evident from the 3.5x multiple that his portfolio has delivered so far and the tremendous success that his fundraising efforts have generated for Artha Venture Fund.

Ashvini Chopra

Sr. Vice President

Bennett & Coleman

Ashvini Chopra heads the Family Office and takes care of Succession Planning, Tax Planning, Wealth Management, Lifestyle Management, Entity management (for investment companies & Charity Trusts) and advising on Board constitution.

He has over 26 years of experience of which 9 years have been as an Estate & Succession Planning Professional. Prior to joining Times Group he was the Founder of Universal Trustees Private Limited (UTPL).

Ashvini is a Diploma Holder in Trust & Estate Practice from STEP UK, an MBA in marketing and a commerce graduate. Currently pursuing LLM at the National Law University, Delhi, he is also a member of Family Firms Institute, Inc. USA (FFI) and Family office Exchange.

SPEAKER BIOGRAPHIES

Ashvin E Rajagopalan

Director

Piramal Museum of Art

With over 17 years of experience in the fields of Fine Art and Luxury, Ashvin is the Founder of Ashvita's, a unique online platform that provides bespoke services to individuals and corporates looking to strategically manage their wealth through way of building a focused and comprehensive art collection. At Piramal Museum of Art, Ashvin leads a team of professionals from the museum field who curate and manage extensive exhibitions at five museum gallery locations across Mumbai. In addition to being Mr. Ajay Piramal's personal Art collector and manager, Ashvin has worked closely with several family collections that are now planned investments and important repositories of heritage and culture.

Christopher Aw

Managing Partner,

Pandan Ventures

A veteran of the investment and technology industries, Chris is currently the Managing Partner at Pandan Ventures wherein he serves as an adviser and investor for start-ups moving within finance, food/agriculture, and industry. Chris is also the Founder and Managing Director of two3six; a company focused on the nexus of operations, technology, and analytics.

Chris is also an operating adviser at Monk's Hill Ventures, a series A-focused, SE Asian, venture capital firm. In addition to these roles, he independently advises multiple start-ups in varying sectors within technology and business.

Dominic Samuelson

Chief Executive Officer,

Campden Wealth

Dominic joined Campden in 2007 and was appointed as the CEO in 2013. Dominic is responsible for strategic development and operational management of all membership, events, publishing, research and online activities. During his tenure, Dominic has launched Campden Research, expanded Campden's community to USA and Asia and was also involved in the acquisition of the Institute of Private Investors in 2011.

Harsh Dhanuka

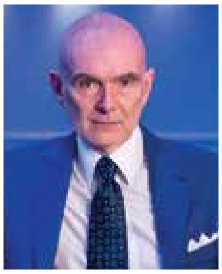
Chief Investment Officer,

SAR Group Family Office

As a Financial Services professional with deep expertise in the Family Office environment and Investment management space, Harsh leads Investment Strategy and has been responsible for setting up and managing people, processes, policies, succession and estate planning for the Single- Family Office of the SAR Group Promoters. His investment expertise spans across a broad array of asset classes and markets (both domestic and global), giving him years of rich experience and an extensive network.In his current role, he is leading efforts with his team to build deeper penetration across asset classes.

Harsh holds a bachelor's degree in Commerce from St Xavier's College, Kolkata & is a qualified Chartered Accountant (ICAI) & Company Secretary (ICSI).

SPEAKER BIOGRAPHIES



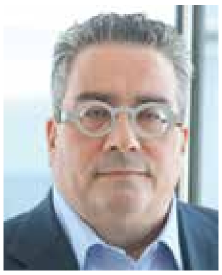
Markus Lehner

Principal,

Markus Lehner Family Office

Markus Lehner is a private Investor who started his career in Vienna as the first importer of Investment Funds. He passed the state exam for Asset Management with distinction and founded several Investment companies and funds during his career.

Consolidating his lifetime achievement now, he is currently creating The Masterpiece, a public German holding company acquiring investment funds, specialised Asset Manager and related sales organisation. Beside this he is a Jet-rated pilot and a car racing Champion.



Philippe J. Weil

Founder & Family Office Principal,

P.J. Weil Ltd.

Philippe J. Weil, a Swiss private banker with over 30 years of experience in global banking & family wealth, immigrated to Israel in 1996. He is the founder and principal of P.J. Weil Ltd. – Family Office, based in Tel Aviv, and divides his time between Tel Aviv and Zurich.

Philippe is the author of 'Woes of the Rich – Seeing beyond the money', a member of international think tanks, industry organisations and associations and a guest lecturer at universities and conferences in Israel and worldwide.

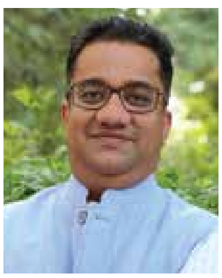
Rajni Thakur

Economist

RBL Bank

A research professional with over 15 years of experience across Policy, Consulting and Banking domain, Rajni brings a unique blend of knowledge and experience on board from her various stints in India, Middle East and UK markets.She has built a reputation for her specialist advice based on application of data and statistics and her understanding of economic relationships to uncover latent trends that are useful to various organisations.

An Economics undergraduate from Delhi University, Rajni holds a M.A. Economics degree from Delhi School of Economics and also an M. Sc. Finance degree from London Business School. Rajni is also actively involved in various global professional women platforms including Lean In circles and Ellevate network.



Rishabh K. Sawansukha

Tax Expert & Founder,

GST Street & BizStreet

A Seasoned Tax & Business Consulting Professional, Rishabh is passionate about research, building Digital Assets for Brands, Communities and Ecosystem building with Premium Consulting & Law Firms in Tax, Legal, Management and Business Advisory.

With a career spanning over two decades, he has served world's leading companies like Schlumberger, Oracle, Coca-Cola, Snapdeal, Cloudacar and Indian Oil.

SPEAKER BIOGRAPHIES

Shridhar Narayan

Group Director & Chief Investment & Strategy Officer

Hiranandani Group

With more than 25 years of experience, Shridhar heads the Family Office of Hiranandani Group and the monetizing of the commercial assets of approximately $1 billion with Brookfield happened under his leadership.

At Hiranandani Group, he is leveraging its intrinsic strengths in envisioning, designing & executing infrastructure for future progress, having now diversified into the Industrial & logistics space with a brand name as “GreenBase”.

Shridhar is an expert in the execution of complex transformational initiatives for top companies with clear focus on driving profitability for organizations by spearheading their evolution from conservative business models to a more process driven and customer-centric models that streamline and align business functions.

Steven H. Hirth

Founder & Principal,

S. H. Hirth & Associates

Steven built S. H. Hirth & Associates as a tribute to two primary non-academic educational experiences: his childhood home environment and his international professional career. The firm focuses on co-investments, domestically and internationally, with other families and individuals. The areas of interest include consumer goods, agriculture, food, real estate, technology, education, and unique opportunities.

Complementing his activities at S. H. Hirth & Associates, Steven also manages his own single Family Office and his Family Foundation.

Steven completed the OPM program at the Harvard Business School. He earned his MBA from Columbia University Graduate School of Business, his Bachelor of Science from North eastern University and is a graduate of the Loomis Chaffee School.

CAMPDEN EVENTS CALENDAR 2020

EUROPE

FAMILY ALTERNATIVE INVESTMENT CONFERENCE
London, UK
3 - 4 March, 2020

MEDTECH INVESTING EUROPE CONFERENCE
Lausanne, Switzerland
1 - 2 April, 2020

FAMILY OFFICE & INVESTMENT CONFERENCE
Geneva, Switzerland
12 - 13 May, 2020

EUROPEAN FAMILIES IN BUSINESS CONFERENCE & AWARDS
Munich, Germany
30 June - 1 July, 2020

MEDTECH INVESTING EUROPE CONFERENCE
London, UK
6 - 7 October, 2020

EUROPEAN FAMILY OFFICE CONFERENCE
London, UK
4 - 5 November, 2020

ASIA

ASIA PACIFIC FAMILY INVESTMENT CONFERENCE
Singapore
19 - 21 May, 2020

CHINA FAMILIES IN BUSINESS CONFERENCE
Shanghai, PRC
22 - 23 September, 2020

ASIA PACIFIC FAMILY OFFICE CONFERENCE
Hong Kong, PRC
25 - 26 November, 2020

INDIA

INDIAN FAMILY IN BUSINESS CONFERENCE
Mumbai
7April, 2020

INDIAN FAMILY ALTERNATIVE INVESTMENT CONFERENCE
Mumbai
11 August, 2020

INDIAN FAMILY OFFICE CONFERENCE
Mumbai
27 - 28 October, 2020

AMERICA

WINTER FORUM FOR PRIVATE INVESTORS
San Francisco, US
4 - 6 February, 2020

AMERICAS FAMILIES IN BUSINESS CONFERENCE
Phoenix, US
25 - 26 February, 2020

SPRING FORUM FOR PRIVATE INVESTORS
New York, US
19 - 21 May, 2020

NORTH AMERICAN FAMILY INVESTMENT & ALTERNATIVES CONFERENCE
Chicago, US
9 - 10 June, 2020

FALL FORUM FOR PRIVATE INVESTORS
New York, US
22 - 24 September, 2020

NORTH AMERICAN FAMILY IMPACT INVESTING CONFERENCE
Denver, US
20 - 21 October, 2020

NORTH AMERICAN FAMILY OFFICE CONFERENCE
Boston, US
17 - 18 November, 2020

FALL FORUM FOR PRIVATE INVESTORS
Dallas, US
8 - 10 December, 2020

Middle East

SAUDI ARABIA FAMILIES IN BUSINESS CONFERENCE
Jeddah, SA
3 - 4 February, 2020

MIDDLE EAST FAMILY ENTERPRISE & INVESTMENT CONFERENCE
Abu Dhabi, UAE
7 - 8 December, 2020

EDUCATIONAL PROGRAMMES

PRIVATE WEALTH MANAGEMENT PROGRAM
Philadelphia, US
3 - 8 May, 2020

Philadelphia, US
19 - 24 July, 2020

Wharton
University of Pennsylvania

CAMPDEN EVENTS CALENDAR 2020

MASTERCLASS

- **MASTERCLASS - ART**
  London, UK
  January, 2020
- **MASTERCLASS**
  Mumbai, India
  8 April, 2020
- **MASTERCLASS - FUTURE TECH**
  London, UK
  June, 2020

MEMBERS SOCIAL EVENT

- **MEMBERS SUMMER DRINKS RECEPTION**
  London, UK
  June, 2020
- **MEMBERS GOLF DAY**
  Buckinghamshire, UK
  August, 2020
- **SEASONAL CELEBRATION**
  London, UK
  December, 2020

WOMEN OF WEALTH WORKSHOPS

- March, 2020 – London,UK
- May, 2020 – London, UK
- October, 2020 – London, UK

CO-INVESTMENT WORKSHOPS

- **February, 2020 – Chennai, India**
- 4 March, 2020 – Chicago, US
- 5 March, 2020 – London, UK
- April, 2020 – London, UK
- May, 2020 – Singapore
- 14 May, 2020 – Geneva, Switzerland
- 19 May, 2020 – New York, US
- **12 June, 2020 – Mumbai, India**
- **12 August, 2020 – Mumbai, India**
- September, 2020 – London, UK
- **28 October, 2020 – Mumbai, India**
- 6 November, 2020 – London, UK
- 27 November, 2020 – Hong Kong, PRC
- **December, 2020 – Ahmedabad, India**

NOTES

THE INDIAN FAMILY OFFICE CONFERENCE 2019

Main Partners:

Edelweiss
Ideas create, values protect
GLOBAL WEALTH & ASSET MANAGEMENT

DLF 5
OUR CITY

Professional Partner:

AZB & PARTNERS
ADVOCATES & SOLICITORS

Supporting Partners:

INSTITUT AUF DEM ROSENBERG
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