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

PRIVATE MEETINGS FOR THE WORLD'S LEADING FAMILIES

INDIAN FAMILY OFFICE FORUM

"Innovative Structures & Investments for the New Economy"

November 24-25, 2021
Virtual Meeting

November 26, 2021
Co-Investment Workshop

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

Main Partner:
First Global Securities

Professional Partners:
DSP Investment Managers Pvt Ltd
Vivriti Asset Management
Certus Capital

Campden Wealth
Events | Publishing | Research | Education | IPI

Campden Club

Institute for Private Investors

www.campdenfamilyconnect.com

WELCOME

Amit Patni

Dear Delegate,

I am delighted to extend a warm welcome to you for Campden Family Connect's annual **Indian Family Office Forum.**

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

We have a great programme ahead of us, with sessions being led by a panel of distinguished speakers, who have so generously given their time to share their knowledge, expertise, and stories. We plan to keep the proceedings as informal as we can, with each session having time set aside for questions and debate. Please feel free to ask the speakers any questions at the end of each session.

We would like to thank our main partner **First Global Securities** and our professional partners: **DSP Investment Managers Pvt Ltd.,Vivriti Asset Management and Certus Capital** who have so kindly assisted us in planning this forum.

Our members across the globe have used these recent times to be actively engaged with the community on our virtual forums. Campden teams globally have produced over 100+ webinars and annual forums with a varied range of relevant topics in the last 18 months.

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

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

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

I wish you an enjoyable and stimulating three days ahead.

Yours faithfully,

Amit Patni
Director
Campden Family Connect

Innovative Structures & Investments for the New Economy

Due to the ongoing Covid-19 situation, global travel restrictions and new limitations on in-person events we are unable to run the Indian Family Office Meeting in-person in Mumbai. We will instead be building on last year's online series of events and be hosting the event digitally, on the 24-25 November followed by Co-Investment Workshop on November 26, 2021

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

Key Highlights Of The Digital Meeting Include:

- **Cutting-Edge Content** - The programme is focused on the theme of "Innovative Structures & Investments for the new Economy"
- **Peer-To-Peer Insight And Intelligence** - Hear directly from both senior executives and family principals of some of the large single family offices.
- **Networking with Leading Families** - Going beyond a normal digital event with one-way talks and presentations, over the 3 days we have designed multiple dedicated sessions allowing family office execs and principals to meet, network and discuss in private and discreet small groups and "virtual rooms".

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

- **Adopt cutting-edge investment strategies to achieve best returns in current times**
- **Innovatively structure family offices to sustain the new economy**
- **Capitalise on upcoming investment opportunities**

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

WHO WE ARE

WHO ARE THE CAMPDEN COMMUNITY

Campden Family Connect is the global membership organization providing thought-leadership, intelligence and networking opportunities for UHNW multi-generation families. Our member- only meeting help the community explore and discuss a range of topics from ethics, leadership and social trends to wealth management, estate planning, investment and governance. Our community members are the world's leading business owning, financial and philanthropic families and their family office senior executives. All of our members are vetted before they join, based on a series of criteria including wealth level. Campden Wealth is the parent company of Campden Family Connect and Institute of Private Investors (IPI)

CORPORATE PARTNERS

In addition to our family members, we have a Campden corporate partner faculty. These organizations have been hand - picked based on their expertise and knowledge areas. During the year, you will hear from the faculty and we encourage you to connect with them throughout and after the events as they can assist you with opportunities and challenges. If you would like to be introduced to any of the faculty, please connect with Kapil Divadkar at Kapil@campdenfamilyconnect.com

CODE OF CONDUCT: SAFE HARBOR

To promote a safe- harbor environment and to encourage interaction and networking, all of Campden Family Connect's meetings are off-the-record.This means, what is said during the meeting cannot be repeated without the permission of the person who said it.

THREE WAYS TO REGISTER

1. Call Devashree Shetye on **+91 84339 93963** or Swapnil Nelugal on **+91 84339 94740**
2. Email at **info@campdenfamilyconnect.com**
3. Book online at **: www.campdenfamilyconnect.com/IFOF_2021.php**

PRESENTATIONS & CONTACT

Campden Family Connect endeavors to provide all presentations, subject to speaker authorization.

Ashwathi Athilat

Email: ashwathi@campdenfamilyconnect.com
Cel: +91 90040 86574

ADMINISTRATIVE NOTES

CONTENTS

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

MOBILE PHONES

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

REGISTRATION

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

VIRTUAL MEETING

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

VISUAL & VIRTUAL BACKGROUND

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

NETWORKING & BREAKOUT DISCUSSIONS

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

PROGRAMME

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

COPYRIGHT NOTICE

NO RECORDING

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

PROGRAMME SCHEDULE DAY 1

Wednesday, Nov 24 • 03:15 PM, India

09:45 AM, London • 04:45 AM, New York • 05:45 PM, Hong Kong

03.15 - 04.00 PM

PRE-SUMMIT VIRTUAL NETWORKING

Only for Campden Members and pre-registered delegates

04.00 - 04.05 PM

WELCOME REMARKS BY AMIT PATNI, DIRECTOR CAMPDEN FAMILY CONNECT

04.05 - 04.15 PM

OPENING REMARKS BY CHAIRPERSON

Devansh Jain • *Executive Director,* **INOX Group**

04.15 - 04.50 PM

FAMILY OFFICE BOOM IN INDIA

Family offices – an increasingly popular yet a relatively new phenomenon in India. The growing UHNI community needs to decide between a Single Family Office and a Multi-Family Office, or even how early to begin. This informative panel discussion will guide families on setting up a family office- when & where to begin, ideal structure (single, multi, embedded), impact of pandemic and broad asset allocation.

Moderator: **Kunal Palta** • *Chief Investment Officer,* **Pankaj Munjal Family Office (Hero Cycles)**

Abhineet Singh • *Head of Investments,* **Al Siraj Holdings (Single Family Office)**

Rohinton Bharucha • *President & CEO,* **Patni Family Office**

04.55 - 05.35 PM

KEYNOTE : HOW TO ACCESS JUST THE RIGHT RISK-REWARD COMBINATION INDIAN & GLOBAL PRODUCTS FOR YOUR NEEDS

The world of investing can be intimidatingly complex with a wide variety of instruments in India and globally, where you're never quite clear what combinations work well for your particular risk-reward needs.
First Global's offerings simplify this greatly with the following characteristics

- Truly Global expertise going back decades, rather than being only a facilitator sourcing products & expertise from elsewhere
- A Unique Artificial Intelligence and Machine Learning model that distills this expertise into a usable, consistent, predictable model
- Custom solutions using liquid instruments with transparency
- Always a focus on risk management so that you get the best returns for your risk appetite

In this session, Devina Mehra will talk about these unique solutions and how they can make life really simple for you

Devina Mehra • *Chairman, Managing Director & Founder,* **First Global**

PROGRAMME SCHEDULE DAY 1

Wednesday, Nov 24 • 03:15 PM, India

09:45 AM, London • 04:45 AM, New York • 05:45 PM, Hong Kong

05.35 - 06.05 PM

FIXED INCOME FUNDS THAT BEAT INFLATION

A world distorted with surplus liquidity makes traded asset classes out of sync with conventional valuations and makes it more taxing to maintain asset allocation. With skin-in-the-game capital & innovative debt funds which protect you for both interest rate & credit risk, Vivriti AMC will help you understand fixed income funds that beat inflation, earn predictable returns and stay close to the asset earning the cash flows. In this session Vineet will throw light on the performing credit space and how it can meet an investor's impact objectives.

Vineet Sukumar, *Founder and Managing Director,* **Vivriti Asset Management Limited**

06.05 - 06.40 PM

HOW TO THINK 'CRYPTO' FOR THE NEXT 10 YEARS AND ALLOCATION STRATEGIES FOR FAMILIES

An early adopter and champion of Bitcoin, Peter began mining in 2010, and is considered one of crypto's pioneers. He has provided digital currency consulting services for private and public software companies as well as security and law-related entities including the US Treasury Department, FinCEN, Department of Homeland Security, and the FBI. Through his venture capital firm and family office, Vessenes continues to invent, incubate, and invest in highly-disruptive start-ups.

With deep-rooted expertise in digital currency, tokenization, and blockchain technology, Peter will share a roadmap for investment opportunities in crypto for the next decade and how families can allocate their wealth to this growing asset class.

Peter Vessenes, *Founding Partner,* **Capital6 LLC**

06.45 PM

CLOSING REMARKS

PROGRAMME SCHEDULE DAY 2

Thursday, Nov 25 • 03:15 PM, India

09:45 AM, London • 04:45 AM, New York • 05:45 PM, Hong Kong

03.15 - 04.00 PM

PRE-SUMMIT VIRTUAL NETWORKING

Only for Campden Members and pre-registered delegates

04.00 - 04.05 PM

REGISTRATION AND OPENING REMARKS BY CHAIRPERSON

Devansh Jain • *Executive Director,* **INOX Group**

04.05 - 04.35 PM

KEYNOTE : SMART BETA STRATEGIES - HOW THEY CAN MAKE A DIFFERENCE TO THE INVESTMENT PORTFOLIO

Factors are the building blocks of investing. They are persistent drivers of long term excess returns that research has proven to be time tested across geographies and asset classes. Understanding how factors work can help investors to make more informed decisions to earn returns, reduce risk or diversify their portfolios. Factor strategies (also known as smart beta) today occupy a sweet spot between active and passive investing as well as providing the investors with the tools to express investment preferences and philosophies in a cost efficient manner.

Prateek Nigudkar • *AVP Risk and Quantitative Analysis,* **DSP Investment Managers Pvt Ltd**

04.40 - 05.10 PM

KEYNOTE : REIMAGINING REAL ESTATE INVESTING

In the western world, real estate investing is transforming from owning physical real estate to financialized real estate. And, intersection of investment expertise and technology is supercharging this trend. In this presentation, we explore this transformation and share perspective on its application in the Indian context.

Ashish Khandelia • *Founder,* **Certus Capital**

05.15 - 05.45 PM

ASIA-PACIFIC FAMILY OFFICE REPORT: A CAMPDEN WEALTH RESEARCH

This report aims to be the most in-depth study on family offices in the region. It covers topics that are key priorities for family offices, such as investing and performance, operational costs, technology, cyber security, governance, risk,succession planning, the next generation, philanthropy, and more. The session will provide rich and granular regional analysis, with a global overlay of what is taking place in the family office space worldwide.

Dominic Samuelson• *CEO,* **Campden Wealth**

05.50- 06.25 PM

FIRE-SIDE : IMPACT INVESTMENT - SMALL BEGINNINGS LEADING TO VAST DEVELOPMENTS

Families are now actively allocating a significant part of their portfolio towards impact investment as families realise they do not have to compromise on returns to go green. This fireside chat will provide expert guidance on true meaning of impact investment in India, leading impact funds / deals, as well as allocation. Experts will share their broader standardization of impact measurement metrics and return benchmark indices. Also hear expert opinions on how sustainable investment will fare over the next few years in India and around the globe.

Moderator: **Amit Mehta,** *Director & Head of Family Office,* **LNB Group**

Leena Dandekar • *Founder,* **Raintree Family Office and Raintree Foundation**

06.30 PM

CLOSING REMARKS AND VOTE OF THANKS

PROGRAMME SCHEDULE DAY 3

Friday, Nov 26 • 04:00 PM, India

10:30 AM, London • 05:30 AM, New York • 06:30 PM, Hong Kong

THE INDIAN FAMILY CO-INVESTMENT WORKSHOP

Co-Investment Chair **: Salil Musale •** *Managing Director,* **Astarc Group**

EXCLUSIVE FOR CAMPDEN MEMBERS ONLY

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

MAIN PARTNER

FIRST GLOBAL

Founded by one of the best investment brains in the world, Ms. Devina Mehra, First Global is among the most cutting edge Asset Management companies in the world, known for its long track record in correctly predicting markets across decades and cycles.

First Global manages nearly three quarters of a billion dollars, in India and globally, for large family offices as well as smaller investors. First Global has developed in-house, some of the world's most advanced artificial intelligence and machine learning investment tech which acts as the central pillar of its investing methodology. This is combined with the best human expertise built over three decades. The results of this unique combinatorial human + machine approach are crystal clear in their Fund / Managed Portfolio's Performance.

First Global's India PMS is, far and away, the best performing in the industry, and First Global's global Funds have delivered consistently market beating returns over the years.

First Global also offers some superb structured products that can be tailored to the risk return requirements of a Family Office.

- First Global is regulated by Securities and Exchange Board of India (SEBI)
- First Global (UK) Ltd. is regulated by Financial Conduct Authority (FCA) in the UK
- First Global (UK) Ltd. is regulated by Securities Exchange Commission (SEC) of the USA
- First Global is regulated by the Cayman Islands Monetary Authority CIMA

First Global's research has been covered widely in Barrons, Wall Street Journal, Business Week, CBS, CNBC, etc. besides Indian media

Devina Mehra

Chairperson, Managing Director & Founder,
First Global

Ms. Devina Mehra is a gold medalist from both the prestigious Indian Institute of Management, Ahmedabad as well as Lucknow University. Starting off with a career in investment banking & Corporate Credit in Citibank, Ms.Mehra founded First Global in 1993 when she got her Bombay Stock Exchange membership. She has been the driving force behind its ground-breaking research and fund management since then.

After building First Global into India's leading Institutional Securities firm, she spearheaded First Global's globalization in 1999 by gaining membership of the prestigious London Stock Exchange (where FG was the first Asian member ex-Japan) and NASD, US in early 2000.

Ms. Mehra is widely regarded as one of the smartest and sanest voices in the investing world. She has been widely quoted in the Wall Street Journal, CNBC, Financial Times, Barron's, Business Week etc besides being featured widely in the Indian print, television and digital media.

For further information please contact:
Devina Mehra, Chairperson, Managing Director & Founder, First Global
Email - devina.mehra@firstglobalsec.com or info@firstglobalsec.com

PROFESSIONAL PARTNER

DSP

MUTUAL FUND

DSP Investment Managers is a 100% independent & Indian asset management company, with a wide range of offerings across the risk-reward spectrum and a track record of over 24 years of consistent investment excellence.

We are backed by the 150+ year old DSP Group. The family behind DSP has been very influential in the growth & professionalization of capital markets and the money management business in India over the last one and a half centuries. Today, DSP Group is headed by Mr. Hemendra Kothari.

We feel honoured that our family of investors come from all walks of life: hard-working salaried people, high-net-worth individuals, NRIs, small & mid-sized business owners, large private & public corporations, trusts and foreign institutions. This gives us a lot of pride and a deep sense of responsibility. Our resolve remains strong, to always be an organization with a purpose - helping investors gain confidence by guiding them to make more responsible investment decisions.

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

Visit us on **dspim.com** for more.

Prateek Nigudkar
AVP, Risk & Quantitative Analysis,
DSP Investment Managers

Prateek Nigudkar is a Quantitative researcher at DSP Investment Managers Pvt. Ltd. (DSPIM). Prateek has been responsible for the DSP Quant Fund since June 2019 and the DSP Value Fund since Dec 2020 and has been with the firm since 2017. Prateek has over 9 years of relevant work experience. Before joining DSPIM, Prateek headed a team of Quantitative analysts in the Equity Smart-Beta team for State Street Global Advisors (SSGA) in India. Prior to SSGA, he spent over 5 years at Credit Suisse as a Quantitative analyst in their Private Wealth research team. At Credit Suisse, he specialized in Thematic and ESG research along with Equity Strategy. Prateek holds a Masters degree in Quantitative Finance from the University of Washington and is FRM certified. He has also cleared all 3 levels of the CFA examination from the CFA Institute

For further information please contact:
Yamini Sood, Head- Institutional Sales and Family Offices
DSP Investment Managers,10th Floor, Mafatlal Center, Nariman Point, Mumbai 400 021
Phone: +91 98206 02949 Email: Yamini.sood@dspim.com

PROFESSIONAL PARTNER

Vivriti Asset Management

Vivriti Asset Management, part of Vivriti Group, offers inflation-beating fixed income alternate investment funds (AIFs) that provide stable and predictable risk-adjusted returns. Pioneers of the performing credit asset class, Vivriti AMC maximises safety, liquidity and return for both domestic & offshore investors through differentiated offerings in the 8-16% spectrum. Our funds come with inbuilt first loss protection and solve for both credit & interest rate risks, two of the largest risks in fixed income investing.

Two of Vivriti AMC's funds have achieved a capital protection rating of Crisil AA+(SO), a testimony to our credit management capabilities and to the scalability of the category. Our funds have been category creators and we now manage commitments exceeding INR 1,500 Cr across four funds.

Over 30% of our portfolio companies have been upgraded in the last 2 years. Quarterly hurdle rates and scheduled payouts have been met despite a tough macro environment, across all our funds.

Our LP base spans marquee family offices, institutional investors, global foundations, domestic treasuries and UHNIs and we help them maintain asset allocation in fixed income and solve for measurable impact investing.

Governance forms the core of what we do. Sequoia , Lightspeed, Creation Investments, LGT Lightrock, & TVS Capital have invested into various parts of the group.

Vineet Sukumar

Founder & CEO,
Vivriti Asset Management Limited

Vineet is the Founder and CEO of Vivriti Asset Management Limited, an AMC that was incorporated in 2019. Vineet is also the co-founder of Vivriti Group which was founded in 2017 and comprises of the India's largest debt platform 'CredAvenue' along with a NBFC. Vivriti Group is recognised as a "Soonicorn" owning to its phenomenal growth, innovation and leadership position in the BFSI space.

Vineet has close to 20 years of experience in financial services and is an industry expert in debt capital markets, performing credit, financial inclusion and fund management. Vineet was amongst the first few fund managers in India to launch debt funds under Category 2 AIF as early as 2014.

Prior to Vivriti, Vineet led IFMR Investment Managers as its CEO and IFMR Capital as its CFO for over 7 years, contributing to its growth from near-inception to over US$ 7.5 bn of business. Vineet earlier worked with the Tata Group and Standard Chartered Bank across roles in investment banking, strategy and capital markets.

For further information please contact:
Prasanna M, Head – Sales
Vivriti Asset Management, 5th Floor, Vibgyor Towers, C-62, G Block – BKC, Mumbai 400051
Phone: +91 9167035214 Email: Prasanna.m@vivritiamc.com

PROFESSIONAL PARTNER

CERTUS™ CAPITAL

Founded in July 2018, Certus Capital ("Certus") is an independent, team owned firm that partners institutional investors and family offices to invest in real estate opportunities in India. Having worked with the likes of KKR, Morgan Stanley, Kotak, HSBC in the past, Certus' team leverages its extensive experience and relationships to bring about disciplined underwriting and thoughtful structuring to every opportunity it pursues. Team's transaction experience exceeds US$3.0Bn. Over the last 3 years, Certus has extensively reviewed ~INR45,000 crores worth of credit portfolios and closed ~INR2,400 crores of deals with foreign institutional investors. Further, Certus has recently launched a fintech platform **http://www.earnnest.me/**, that brings institutional quality opportunities, diligence and asset management to the broader domestic wealth market

Ashish Khandelia

Founder,
Certus Capital

Ashish has 20+ years of experience with expertise in Real Estate Investing and Lending. In his earlier roles, he led RE businesses at KKR and Morgan Stanley Real Estate (MSRE) in India. He has ~US$2.0Bn of transaction experience and has been instrumental in building three businesses around real estate banking, equity investing and lending. He founded Certus Capital in July 2018, with a vision to build an integrated real estate investment management platform. Since founding Certus, has closed ~INR2,400 crores of transactions with global financial institutions and has launched a fintech platform, **www.earnnest.me**, that democratises access to institutional quality deals and makes them accessible for individual investment. Prior to Certus, under his leadership as the Co-Head of KKR's Real Estate business in India, the business invested more than US$1Bn in high-yield real estate credit and as the Head of Acquisitions for Morgan Stanley Real Estate, India, he was part of US$700mm+ of primarily equity investments. Ashish is a management graduate from Indian School of Business, Hyderabad and a Chartered Accountant.

For further information please contact:
Ashish Khandelia, Founder, Certus Capital
WeWork, C-20, G Block Rd, Bandra Kurla Complex, Mumbai, Maharashtra - 400051
Phone : +91 98679 49944 Email: ashish.khandelia@certus.co.in

SPEAKER BIOGRAPHIES

CHAIRPERSON:

Devansh Jain

Executive Director,

INOX Group

Devansh hails from one of India's largest and most successful business groups, the $4 billion INOX Group which has interests in Chemicals, Industrial Gases, Engineering Plastics, Cryogenic Engineering, Entertainment and Renewable Energy.

Devansh is also the Founder of INOX Wind Limited, the wind turbine arm of the Group. Under his leadership, since its inception, Inox Wind has achieved tremendous growth and in a short span of 10 years, has gone on to become one of the largest and most successful renewable energy companies. He oversaw Inox Wind's IPO on the BSE and NSE in the year 2015.

Devansh has been the recipient of many awards for his entrepreneurial success and leadership, amongst them are, A Role Model for Responsible Entrepreneurship by Hurun Report 2019, the prestigious AIMA award for Young Entrepreneur of the Year 2017 and many more.

Devansh has a Double Major in Economics and Business Administration from Carnegie Mellon University, Pittsburgh, USA. He is on the board of many of the INOX Group companies and directly oversees their strategic planning and growth.

CO-INVESTMENT CHAIR:

Salil Musale

Managing Director,

Astarc Group

Salil leads multiple group companies and spearheads their growth and diversification into new global markets and technologies. Prior to joining Astarc Group, Salil worked with A.T. Kearney, where he was involved in project management and business analysis for various clients.

Abhineet Singh

Head of Investments,

Al Siraj Holdings (Single Family Office)

Abhineet heads institutional size global investment portfolio at Al Siraj Holdings, a renowned Single-Family Office in Oman. He has more than a decade of experience in investment management industry, managing portfolio for multiple family offices. He had previously worked with institutional research organizations such as Fidelity International (UK) and S&P global. During his career, he not only specialized in global sectors such as Technology, Industrials, Financials , and Consumers, but also in the developed and frontier markets.

Abhineet holds an MBA from NMIMS, Mumbai and has successfully completed Value Investment Program from Columbia Business school, US. He is also a Financial Risk Manager (FRM,US) Charter holder.

SPEAKER BIOGRAPHIES

Amit Mehta

Director & Head of family office,
LNB Group

At LNB Group (a family in business for more than 100 years), Amit helps oversee diversified businesses of Textile Manufacturing, Tea Plantations, Renewable Energy, Agribusiness (farming & post harvest supply chain) and Investments (Debt/Listed and Unlisted Equity/Structured Finance). Previously, he worked with the Tata Group where he was one of the youngest to have qualified as an External Assessor of TBEM.

Alumni of Harvard Business School, Amit is a qualified Chartered Accountant, M. Com & member of various professional bodies like the Association of Certified Treasury Managers (USA), Association of Corporate Advisers & Secretaries, Institute of Internal Auditors (USA). and Charter Member of TiE Hyderabad.

He has also served on the Committee for Members in Industry at the Institute of Chartered Accountants of India, as a Nominee on the National Executive Committee of FICCI, Committee on Corporate Laws and Committee on Capital Markets of FICCI.

Kunal Palta

Chief Investment Officer,
Pankaj Munjal Family Office (Hero Cycles)

A private banker and advisor to family offices, Kunal has close to 17 years of professional experience spread across team management in multinationals and boutique wealth management firms. He also has working exposure to Private & Corporate Banking, sales of investment products and setting up new business in up country locations in India. As CIO of Hero Cycles family offices. Kunal manages Co. Fx risk, surplus funds management in equity, debt, alternates including private

Leena Dandekar

Founder,
Raintree Family Office and Raintree Foundation

Leena co-founded Raintree Family Office along with her children, Abha Dandekar and Vivek Dandekar. She oversees Raintree as a strategist, a portfolio focused on balancing social and economic returns.

The Raintree Family Office portfolio spans ESG conscious alternative assets, impact investments as well as private philanthropic investments in the family's foundation – Raintree Foundation. The family office is actively working towards making equity investments in ESG conscious enterprises and within that specially focusing on creating an impact portfolio that makes investments in innovative for-profit enterprises that address critical social and environmental issues.

Before starting the Raintree Family Office and Raintree Foundation, Leena served as a member of the Board of Directors of the Camlin Group.

In addition to working closely with social entrepreneurs and the family foundation, Leena loves gardening, and is a voracious reader. Leena holds a Bachelor of Arts in Economics, a Masters in Management Studies, and an LLB from Mumbai University.

SPEAKER BIOGRAPHIES

Peter Vessenes

Founding Partner,

Capital6 LLC

Peter Vessenes has deep roots in digital currency, tokenization, and block chain technology. An early adopter and champion of Bitcoin, he began mining in 2010, and is considered one of crypto's pioneers. Vessenes has provided digital currency consulting services for private and public software companies as well as security and law-related entities, including the US Treasury Department, FinCEN, Department of Homeland Security, and the FBI.

In 2012 he founded CoinLab, the first venture-backed Bitcoin company, as well as the first company to deliver 65nm Bitcoin mining chips at scale. In 2016, Vessenes launched New Alchemy, providing blockchain technology, strategy, and capital solutions to some of the world's most innovative companies. In 2020, Vessenes co-founded Noteworthy—the premiere designer of physical banknotes that represent various denominations of Bitcoin and other digital currencies.

Through his venture capital firm and family office, Vessenes continues to invent, incubate, and invest in highly-disruptive start ups. He serves as senior advisor to many of Capital6's portfolio companies.

Vessenes graduated from Brown University with a BSc. in Mathematics with a focus on cryptography.

Rebecca Gooch

Sr. Director of Research,

Campden Wealth

Rebecca oversees a range of global thought leadership projects on the ultra-high net worth, family office and family business space. As the author of the well-respected Global Family Office Report, she regularly publishes reports on family office cross-asset class investing, impact investing, philanthropy, next generation wealth succession, and more.

American born, Rebecca moved to the United Kingdom from California in the early 2000s. With 20 years of experience, her career spans investing, research, analysis, and thought leadership. The recipient of past research awards, she has a PhD in regulation and compliance from the London School of Economics, an MSc from Oxford University, and a BA from UC Berkeley, California. Her research is regularly profiled in major news outlets such as Bloomberg, Reuters, Financial Times, Forbes and The Economist.

Rohinton Bharucha

President & Chief Executive Officer,

Patni Family Office

Having recently retired, Rohinton established one of the earliest Family Offices in India in 2003 for the Patni Family and has been managing their Family Office since then. He brings 45 years of experience in domestic and global capital markets to the table. Rohinton combines understanding macro-economic with technical charts to reach a higher success ratio in his asset class returns predictions. His competency includes an understanding of legal and regulatory compliance concepts as well. Rohinton was previously involved in implementing His Majesty's Royal Decree to set up the State General Reserve Fund in the Sultanate of Oman, one among the first dozen odd Sovereign Wealth Funds.

CAMPDEN CALENDAR 2021

DECEMBER

1

VIRTUAL

US

FAMILY ENTERPRISE SEMINAR

1 - 2

IN-PERSON

EU

EUROPEAN FAMILIES IN BUSINESS FORUM

2

VIRTUAL

US

WOMEN OF WEALTH

6 – 8

IN-PERSON

US

IPI END OF YEAR FORUM

17

VIRTUAL

IN

PRIORITIZING CYBER SECURITY FOR BUSINESS FAMILIES

LEGEND

- VIRTUAL EVENT
- IN-PERSON EVENT
- EUROPEAN EVENT
- INDIAN EVENT
- ASIA-PACIFIC EVENT
- US EVENT

On occasion, dates, times and/or locations may change due to unforeseen circumstances. Prior to bookings, please confirm event details with the Campden Wealth team.

INDIAN FAMILY OFFICE FORUM

Main Partner:

FIRST GLOBAL

Professional Partners:

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