

INDIAN FAMILY OFFICE MEETING

“Building Future Ready Family Offices”

January 19-20, 2021

Virtual Meeting

January 21, 2021

Co-Investment Workshop

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



Main Partner:

JULIUS BAER

Professional Partners:

DSP INVESTMENT MANAGERS PVT LTD

CERTUS CAPITAL

INSTUT AUF DEM ROSENBERG

In affiliation with:

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**INSTITUTE
for
PRIVATE
INVESTORS**

www.campdenfamilyconnect.com

WELCOME



**Amit
Patni**

Dear Delegate,

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

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

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

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

We would like to thank our partners: **Julius Baer, DSP Investment Managers Pvt Ltd., Certus Capital and Institut Auf Dem Rosenberg** who have so kindly assisted us in planning this forum.

Our members across the globe have used these recent times to be actively engaged with the community on our virtual forums. Campden teams globally have produced over 90+ webinars and annual forums with a varied range of relevant topics in the last 6 months.

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

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

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

I wish you an enjoyable and stimulating three days ahead.

Yours faithfully,

Amit Patni

Director

Campden Family Connect



BUILDING FUTURE READY FAMILY OFFICES

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 19-20 January followed by Co-Investment Workshop on January 21, 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 "Building Future Ready Family Offices"
- **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:

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

We designed this meeting to bring together highly prominent family principals, chief executives of private family offices and innovative strategists to share their experience, learn from each other and network within their peer group. Our excellent array of speakers representing global family businesses, 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.

THREE WAYS TO REGISTER:

- 1 Call Devashree Shetye on +91 84339 93963 or Swapnil Nelugal on +91 84339 94740
- 2 Email at info@campdenfamilyconnect.com
- 3 Book online at campdenfamilyconnect.com/IFOM_2021.php

ADMINISTRATIVE NOTES



CONTENTS

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



MOBILE PHONES

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



REGISTRATION

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



VIRTUAL MEETING

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



VISUAL & VIRTUAL BACKGROUND

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



NETWORKING & BREAKOUT DISCUSSIONS

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



PROGRAMME

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



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AUDIO

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



NO RECORDING

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

PROGRAMME SCHEDULE

Tuesday, January 19, 2021

15.15 – 16.00 PRE-SUMMIT VIRTUAL NETWORKING

Only for Campden Members and pre-registered delegates

16.00 – 16.05 WELCOME REMARKS BY AMIT PATNI, DIRECTOR, CAMPDEN FAMILY CONNECT

16.05 – 16.15 OPENING REMARKS BY CHAIRPERSON

With the roots of the Jetline Group originating back to the 1930s in Bangkok, Thailand and a presence in India since 1974, Rajan is a Nextgen and a visionary who led the group's foray into digital platforms through JetSynthesis. Currently having operations in India, MENA, SE Asia, UK, Japan and USA, the company now has operational businesses in new age digital media, entertainment and in many other categories.

In this session, hear him share his journey of building a future ready family office including

- Key elements for a futuristic family office
- Digital assets- opportunities, returns & risks
- Global family office best practices for preservation & transition of wealth across generations.

Rajan Navani • Vice Chairman & Managing Director, Jetline Group of Companies

16.15 – 16.50 LOOKING AHEAD TO 2021- AN INVESTMENT & ECONOMIC OUTLOOK

A strong recovery in 2021 is critical to help the global economy heal from the coronavirus pandemic. However, IMF recently downgraded its forecasts and warned of a long, slow recovery. In this session, hear experts share economic outlook, preparing for a continued period of inflation to exploring global investment opportunities and how Families can adapt and strengthen their portfolio for the years ahead.

Moderator: Puneet Jain • Head, Karan Thapar Family Office

Dr. Aditya Srinivas • Chief Operating Officer and Chief Economist, Bombay Stock Exchange Broker's Forum

Jai Rupani • Chief Investment Officer, Dinesh Hinduja Family Office

16.55– 17.25 INTERVIEW: LEARNINGS FROM AN INVESTOR'S JOURNEY

With an experience spanning over 20 years, Vinit currently heads Equities at DSP Investment Managers (DSPIM) and also manages various funds namely- DSP Small Cap, DSP Mid Cap, DSP Top, 100 and DSP Focus Funds in addition to a fund for international investors interested in India. He joined DSPIM in 2007 as a Portfolio Analyst with sectoral focus on Pharmaceuticals, Power Utilities, Chemicals, Fertilizers and Textiles.

In an interview led by Aditi Kothari Desai, this session will bring forth Vinit's insights on his investment framework and philosophy that has helped him identify wealth-creating companies consistently, over the years. This interview will also guide Families on the mistakes to avoid when structuring their portfolio.

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

Vinit Sambre • Head Equities, DSP Investment Managers Pvt Ltd

17.30– 18.00 AN INSTITUTIONAL PERSPECTIVE TO REAL ESTATE INVESTING

We share a perspective of how multi-billion dollar institutional investors have used Real Estate in their portfolio strategies and where their current thinking is. We draw pointers that Families may consider for the role of real estate investment as an income enhancer and an inflation hedge, especially in the prevailing liquidity awash, low interest rate environment.

Ashish Khandelia • Founder, Certus Capital

PROGRAMME SCHEDULE

Tuesday, January 19 , 2021

18.05 – 18.40 **HOW TO PRESERVE AND GROW WEALTH FOR MULTIPLE GENERATIONS**

Wealth typically has a high attrition rate with its transition across generations. While in some cases the family wealth disappears by GEN3, in other cases it's the family business that's lost. How can the current generation of matriarchs/ patriarchs and their beneficiaries beat the odds and ensure the wealth is preserved and grown too?

In this keynote session, David Lladro, 2nd Gen member of the Lladro family, will share

- Journey from running the family business successfully to setting up a single family office
- Asset allocation specifically in technology for enhanced returns
- Best practices/ tips for smoother transition of wealth across generations

David joined the Family Business, Lladró, an international luxury Giftware Company in 2000. During the years at Lladró, he was directly involved in planning succession from first to second generation. As the CEO of the family office, David invests in different sectors such as Real Estate, Energy, Health Care, Technology, among others.

David Lladró • Chief Executive Officer, LLADRO Family Office

18.45 **CLOSING REMARKS**

PROGRAMME SCHEDULE

Wednesday, January 20, 2021

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

Only for Campden Members and pre-registered delegates

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

16.05 – 16.50 **INVESTING IN TOMORROW'S WINNERS TODAY**

Jiazhi will help you access global investment opportunities that capture some of the megatrends and key investment themes such as - Digital Disruption, Energy Transition, Arising Asia, Feeding the World & Shifting Lifestyles and help you participate in the structural growth stories through the Julius Baer Next Generation Fund.

Jiazhi Chen Seiler • Head Next Generation Investment Management, Bank Julius Baer

16.55 – 17.30 **EMBRACING OPPORTUNITIES IN PE SECTOR**

It is a given that each Family Office is different but it is also true that along with the usual listed equity and bond portfolio, family offices have a great appetite for direct investing / private equity. Traditionally family offices have been investing in VC funds. However, there is a large pool of PE players who seek investments from institutional players. This session will analyse the opportunities in PE sector, types of PE funds available and risks & returns enabling Families to understand the challenges and opportunities therein.

Moderator: Vinod Abrol • Head-Private Investments, SAR Family Office

K. C Ganesh • President, Prayog Advisor

Ladislav Sekerka • Partner, Consillium Family Office

17.35 – 18.05 **INVESTING FOR GLOBAL IMPACT: A POWER FOR GOOD 2020**

Campden Wealth's Investing for Global Impact: A Power for Good report, partnered by GIST and Barclays Bank, is one of the most in-depth and insightful analyses of individuals', families', family offices', and family foundations' attitudes towards and activity within impact investing in the world today. The research explores respondents' investment strategies, portfolio allocations, returns, forthcoming expectations, and investment challenges. It also takes the pulse on pressing global issues, highlighting the environment and climate change as a key theme, along with an examination of the private wealth community's response to COVID-19. This session will dive into the themes, data and statistics enabling impact investors to benchmark their perceptions, investment approaches, challenges and evolution against the industry standard.

Moderator: Rebecca Gooch • Director of Research, Campden Wealth

Damian Payiatakis • Head of Impact Investments, Barclays

Gamil de Chadarevian • Founder, GIST Initiatives

18.10 – 18.40 **KEYNOTE: LEARNINGS OF A LEADER**

While families herald the success of their founders and often seek to replicate or outperform previous successes, much more important – and less spoken about – are the mistakes that were made along the way. During this session, we explore how the Leader has set-up a framework that enables practical learnings from failures in managing family wealth.

Suneeta Reddy • Managing Director, Apollo Hospitals Group

18.45

CLOSING REMARKS

PROGRAMME SCHEDULE

Thursday, January 21, 2021

THE INDIAN FAMILY CO-INVESTMENT WORKSHOP

1600- 1730 IST

Chair: Anirudh Damani • Managing Partner, Artha Venture Fund

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.

As the Chair of the workshop, Anirudh Damani will moderate deals and also present his perspectives on **'Is India going to be the unicorn factory for the world?'**. His presentation would also cover the opportunities for Indian start-ups and investors alike.

PARTNER

Julius Bär

YOUR WEALTH MANAGER

Julius Baer is the leading Swiss wealth management group and a premium brand in this global sector, with a focus on servicing and advising sophisticated private clients. At the end of April 2020, assets under management amounted to CHF 392 billion. Bank Julius Baer & Co. Ltd., the renowned Swiss private bank with origins dating back to 1890, is the principal operating company of Julius Baer Group Ltd., whose shares are listed on the SIX Swiss Exchange (ticker symbol: BAER) and are included in the Swiss Leader Index (SLI), comprising the 30 largest and most liquid Swiss stocks. In India, Julius Baer is the only international, listed pure play wealth manager. Our client-centric approach, objective advice based on the Julius Baer open product platform, solid financial base and entrepreneurial management culture make us the international reference in wealth management.

Through our strong coverage of NRIs across the world, Julius Baer's "global Indian" approach is one of the biggest competitive advantages and a strategic aspect of its Global India market strategy. In India, Julius Baer is present across key metros including Mumbai, New Delhi, Chennai, Bangalore, Hyderabad and Kolkata.

Internationally, Julius Baer is present in over 25 countries and more than 60 locations. Headquartered in Zurich, we have offices in key locations including Dubai, Frankfurt, Geneva, Hong Kong, London, Luxembourg, Mexico City, Milan, Monaco, Montevideo, Moscow, Mumbai, São Paulo, Singapore and Tokyo.



Jiazhi Chen Seiler

*Head Next
Generation
Investment
Management*

Jiazhi joined Bank Julius Baer in December 2011, starting in Asia Investment Solutions, where she played a key role in supporting the 'Asia: Our Second Home Market' strategic initiative. From 2013 to 2016, Jiazhi was Head of the Investment Specialists Growth Markets team, where she played an active role in promoting, advising on, and managing growth markets-focused investment solutions, including thematic investments in Asia.

From late 2016 to 2017, Jiazhi became Head of the Next Generation team within Research & Investment Solutions. She focused on the 'Arising Asia' theme, which explores the growing economies and expanding middle classes of emerging Asia. And since 2018, she has been the lead manager of JB Next Generation Fund.

Prior to joining Julius Baer, Jiazhi was a fund manager at Vontobel Asset Management in Zurich. In her role, she was responsible for the management of the Vontobel Fund – Japanese Equities, Vontobel Fund- Global Responsibility Asia ex Japan Equity, and Vontobel Fund – China Stars Equity. Before joining Vontobel, she was a buy-side analyst at Credit Suisse Private Banking and Nikko Bank Switzerland. Jiazhi has over 25 years of investment experience, with a strong focus on Asian equities. She holds a Bachelor of Science in Economics from HEC Lausanne (University of Lausanne, Switzerland), as well as a Bachelor's degree in Foreign Literature from the Beijing Foreign Languages Institute, People's Republic of China. Jiazhi is a CFA® charterholder.

For further information please contact:

Shirin Poonawalla Executive Director, Julius Baer India

Julius Baer Wealth Advisors (India) Private Limited 8th Floor, Mafatlal Centre Nariman Point, Mumbai 400021

Phone : 91 22 6176 0118 Mobile: 9833715690

PARTNER

DSP MUTUAL FUND

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

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

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

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

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

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



**Vinit
Sambre**

Head Equities

Vinit Sambre is Head – Equities at DSP Investment Managers Pvt. Ltd. (DSPIM). He has been managing the DSP Small Cap Fund since June 2010 and is also the Fund Manager for the DSP Mid Cap Fund, DSP Top 100 Fund and DSP Focus Fund. Vinit has over 20 years of relevant work experience.

Vinit joined DSPIM in July 2007, as Portfolio Analyst for the firm's Portfolio Management Services (PMS) division, which manages discretionary accounts and provides advisory services to institutional clients. As a research analyst, his focus was on sectors like Pharmaceuticals, Power Utilities, Chemicals, Fertilizers and Textiles.

Previously, he was with DSP Merrill Lynch as a part of its Global Private Client business. He spent 20 months at DSP Merrill Lynch as Equity Strategist. Prior to DSP Merrill Lynch, he was employed with IL&FS Investsmart Limited as an Equity Analyst in their PMS division. He has also worked with UTI Investment Advisory Services as Equity Analyst for the offshore fund – India Growth Fund. Vinit is a Chartered Accountant from Institute of Chartered Accountant of India.

For further information please contact:

Yamini Sood, Head- Institutional Sales and Family Offices

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

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

PARTNER



Founded in July 2018, Certus Capital is an independent, team owned platform. Certus partners institutional investors and family offices to invest in real estate (RE) opportunities in India. Team's transaction experience exceeds US\$3.0Bn. Ex- employers include KKR, Morgan Stanley, Kotak, HSBC. Certus targets deep value and scalable opportunistic plays created by capital dislocations. Representative transactions include one of India's first securitization of wholesale RE loans (~US\$200MM acquisition of such loans by a large institutional investor (US\$120Bn+ AUM) from a distressed financier) and partnering another institutional investor (US\$40Bn+ AUM) in its US\$500MM bid for acquisition of a non-bank RE financier through a lender-led resolution. Certus continues to pursue bespoke investor partnerships with aligned interests.

Integrity, Excellence and Perseverance are the principles that define Certus and the partnerships it seek to create.

[Https://www.certuscapital.in](https://www.certuscapital.in)



**Ashish
Khandelia**

Founder

Ashish has over 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\$1.9Bn 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. Prior to Certus, he was the Co-Head of KKR's Real Estate business in India. Under his leadership since 2013, KKR RE business invested more than US\$1Bn in high-yield real estate credit. Before KKR, he was Head of Acquisitions for Morgan Stanley Real Estate, India wherein he was part of US\$700mm+ of primarily equity investments. He has also worked at Kotak Investment Bank and Ernst & Young. At Kotak, he was instrumental in establishing Kotak's real estate investment banking practice and executing one of the first entity-level PE investment in Indian real estate sector. Ashish is a management graduate from Indian School of Business, Hyderabad (2003 batch) and a Chartered Accountant.

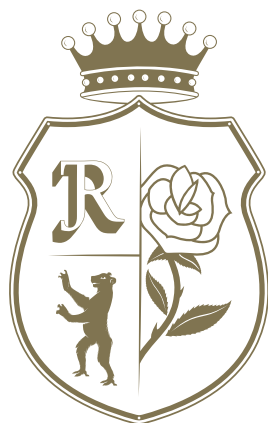
For further information please contact:

Ashish Khandelia, Founder, Certus Capital

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PARTNER



INSTITUT
AUF DEM
ROSENBERG

THE ARTISANS OF EDUCATION®



Manuel Bernardo

*Head of Relationship
Management,
Admission &
Communication*

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

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

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

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

After successfully graduating from Institut auf dem Rosenberg in 2009, Manuel moved to the famous Ecole hôtelière 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

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SPEAKER BIOGRAPHIES

CHAIRPERSONS:



Rajan Navani

Vice Chairman & Managing Director, Jetline Group of Companies

The Jetline Group recently made significant investments and is building new age businesses in powering varied consumer-facing digital platforms, products and services through group company 'Jetsyntesys'. Under Rajan's leadership, besides the traditional businesses, the group is also building artificial intelligence, block chain and AR/VR/MR/XR led Industry 4.0 solutions to strengthen enterprises globally.

Rajan is also deeply engaged with the start-up ecosystems in India, Israel, Singapore, UK, Japan & USA. He is currently the Chairman of CII's National Council on Future Businesses, CII Council on India@75 and is a member of CII's National Council. He is a global board member of the US-India Business Council (USIBC) and a member of the Purdue-India Executive Council, the Singapore-India and Israel-India Track II strategic dialogues and India Sweden Business Leaders Forum.

Rajan is also playing an active role in helping shape US-India government and business partnerships and is board member of Indiaspora, a powerful network linking the Indian American Diaspora with India



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 70 start-ups that are almost completely funded by a renewable energy asset in Rajasthan. His knack for picking winners is evident from the 3.81 x multiple that his portfolio has delivered so far and the tremendous success that his fundraising efforts have generated for Artha Venture Fund.



Aditi Kothari Desai

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

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

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

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



Dr. Aditya Srinivas

Chief Operating Officer and Chief Economist, Bombay Stock Exchange Broker's Forum

Dr. Aditya has a total of 16 years of corporate experience and has represented India at Harvard University USA, South Korea, Japan, Maldives, Oman, Dubai, Hong Kong, Taiwan, Sweden, Indonesia, Turkey to name a few countries.. He has taken more than 2000 sessions on Indian Economy and stock market and trained more than 65000 participants across India.

His qualifications are BBF Finance (Dist), MBA Finance (Gold Medal), Ph. D (Economics) MDP (IIM Ahmedabad), CWM, D.Litt (USA), ISO 9000 Lead Auditor. He has also presented 23 research papers in National and International conferences and has published 35 Research papers.

SPEAKER BIOGRAPHIES



David Lladro

Chief Executive Officer,
LLADRO Family Office

David Lladro Roig licensed from University of Navarra with a degree in Business & Economics.

David worked in JP Morgan and Ford Motor Co. before joining the Family Business, Lladro, an international luxury Giftware Company. During the years at Lladro, David was directly involved in planning succession from first to second generation as well as professionalizing the Family Business.

Since 2007, David has been running their Family Office as CEO, investing in different sectors such as Real Estate, Energy, Health Care, Technology, among others.

During the last 20 years, David has had senior executive roles in different portfolio companies as well as Chairman and Board member in many of these companies. David is currently a member of the Advisory Board of two International Private Equity Funds.



Jai Rupani

Chief Investment Officer,
Dinesh Hinduja Family Office

Jai is a man who wears many hats. As the CIO of the Dinesh Hinduja Family Office, he oversees investments across all asset classes for the group: real estate, equities, bonds, structured products, private equity and venture capital. He is also the Managing Partner for Gokaldas Lifestyle, the Group's luxury real estate development firm.

Prior to joining the Gokaldas Group, Jai was part of the investment team at True North and led its investments into Merucabs and ACT Broadband. Earlier, he spent several years as an investment banker with The Royal Bank of Canada Capital Markets Group in San Francisco where he managed IPO's, private placements and M&A deals.

He has completed his formal education in Finance and Real Estate at the University of Michigan, Ann Arbor (BBA) and the University of Texas at Austin (MBA) in the United States. In his free time he enjoys mentoring start-ups, playing golf and spending time with his family.



K.C. Ganesh

President,
Prayog Advisors

Ganesh is a Chartered Accountant, Cost Accountant and Company Secretary. He has over two decades of rich and cross functional experience in fund management, financial control, cost optimization and statutory compliance. He has worked with multiple organizations like Skandia, KPMG, Reliance, Infosys & Cognizant over the last two decades. He is a constant learner completing a 6 month Analytics Specialization from Wharton recently. He also mentors a few start-ups pro bono and also runs a trust for funding education of slum children. He currently manages the family office of Kris Gopalakrishnan, one of the co-founders of Infosys.



Ladislav Sekerka

Partner,
Consillium Family Office

With over a decade of professional experience in international banking environment, Ladislav has been managing investments of Consillium Family Office for over 4 years.

In the past, he has held several senior roles at UBS Switzerland in the wealth management, corporate and asset management with a particular focus on comprehensive investment solutions, business development, financing, family office services and portfolio management.

He has completed his Masters in International Business and Program for Leadership Development from Harvard Business School.

SPEAKER BIOGRAPHIES



Puneet Jain

Head,
Karan Thapar Family Office

Born & brought up in Delhi with a Commerce degree from Delhi University & MBA, Puneet joined Corporate Office of Mr.Karan Thapar in 2012 and was instrumental in setting up the family office structure and has been managing the family office investments since then. Over the last 8 years, the core focus has been on wealth preservation and his role has encompassed several functions related to wealth management, estate planning and merchant banking

An avid traveller, erstwhile Puneet was a private banker with stints at ICICI Securities, HSBC Bank & Citibank.



Rebecca Gooch

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.



Suneeta Reddy

Managing Director,
Apollo Hospitals Group

A member of the founding family, Suneeta joined the enterprise in 1989 as the Finance Director and has spear headed several fund-raising and investment decisions. Today, she steers Corporate Strategy, Acquisitions and Operations, while continuing to oversee Finance.

Suneeta serves on the Board of several Apollo Hospitals' Group companies. She is a member of Harvard India Advisory Board and also served as a member of the Harvard Business School Medical Advisory Board. In addition to being a member of various eminent industry bodies, she is also the Chairperson of CII Asia Health Summit 2020.

In 2019, Suneeta was featured No.3 in Fortune India's list of Most Powerful Women.

She holds a Diploma in Financial Management from the Institute of Financial Management and Research (IFMR) Chennai and has completed the Owner / President Management Program at Harvard Business School (HBS), Boston, USA.



Vinod Abrol

Head-Private Investments,
SAR Group Family Office

Vinod has over 20 years of finance experience across fund raising, building start-ups, diligence, and structuring deals. Currently heading SAR Family office's VC investments, he manages \$30 mn invested across 15 start-ups in cleantech, fintech, co living, smart homes, cloud kitchens, EV and mobility sectors.

Previously, he was instrumental in the IPO of Bharti Infratel, the CFO at Jabong and also had stints with EY and PwC.

CAMPDEN CALENDAR 2021

JANUARY

12 – 14

VIRTUAL
IPI Forum



19 – 21

VIRTUAL
INDIAN FAMILY
OFFICE FORUM



21

VIRTUAL
FUND SEMINAR



27

VIRTUAL
BRIEFING (K-GAL)



FEBRUARY

4

IN-PERSON/
VIRTUAL
EUROPEAN
FAMILY OFFICE
FORUM



9 – 11

VIRTUAL
FAMILY OWNERS
& OPERATORS
MEETING



12

VIRTUAL
CFC WEBINAR



25

VIRTUAL
FUND SEMINAR



MARCH

9 – 11

VIRTUAL
FAMILY OFFICE
MEETING



12

VIRTUAL
CFC MEMBER
MEETING



16 – 17

IN-PERSON
CHINA FAMILY
BUSINESS/
SUCCESSION
PLANNING
SHANGHAI



APRIL

6 – 8

VIRTUAL
MEGA TRENDS
MEETING



15

VIRTUAL
FUND MEETING



21 – 23

VIRTUAL

INDIAN FAMILIES
IN BUSINESS
FORUM



28 – 29

IN-PERSON
FAMILY INVESTMENT
FORUM



MAY

11 – 13

VIRTUAL
IPI SPRING FORUM



17

IN-PERSON
FAMILY OFFICE
PRIVATE MARKETS
FORUM SINGAPORE



18 – 19

IN-PERSON
FAMILY AND FAMILY
OFFICE INVESTMENT
FORUM SINGAPORE



21

VIRTUAL
CFC WEBINAR



JUNE

8 – 11

VIRTUAL
FAMILY
INVESTMENT &
ALTERNATIVES
MEETING



18

VIRTUAL
CFC MEMBER
MEETING /
ROUNDTABLE



23 – 24

IN-PERSON
FAMILY
ALTERNATIVE
INVESTMENT
FORUM



JULY

9

IN-PERSON/
VIRTUAL
CFC WEBINAR/
ROUNDTABLE



AUGUST

11 – 13

IN-PERSON/
VIRTUAL
INDIAN
ALTERNATIVE
INVESTMENT
FORUM



SEPTEMBER

3

IN-PERSON/
VIRTUAL
CFC WEBINAR/
ROUNDTABLE



15 – 16

IN-PERSON
FAMILIES IN
BUSINESS FORUM
& AWARDS



21 – 23

IN-PERSON
IPI FALL FORUM



CAMPDEN CALENDAR 2021

OCTOBER

6 – 7
VIRTUAL
FAMILY INVESTMENT
FORUM



8
IN-PERSON/
VIRTUAL
CFC WEBINAR/
ROUNDTABLE



12 – 14
IN-PERSON
FAMILY INVESTMENT
MEETING



18 – 22
IN-PERSON
CHINA FAMILY
BUSINESS/
SUCCESSION
PLANNING
SHANGHAI



NOVEMBER

3 – 5
IN-PERSON
FAMILY OFFICE
FORUM



16 – 18
IN-PERSON
FAMILY OFFICE &
BUSINESS MEETING



24 – 26
IN-PERSON/
VIRTUAL
INDIA FAMILY
OFFICE FORUM



30 – 01
IN-PERSON
FAMILY OFFICE
& SUCCESSION
FORUM
HONG KONG



DECEMBER

6 – 8
IN-PERSON
IPI END OF YEAR
FORUM



17
IN-PERSON/VIRTUAL
CFC WEBINAR/
ROUNDTABLE



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.

CAMPDEN CLUB

MEMBERSHIP

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

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

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

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

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

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

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

Member since 2008

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

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

www.campdenfamilyconnect.com

INDIAN FAMILY OFFICE MEETING 2021

Main Partner:

Julius Bär
YOUR WEALTH MANAGER

Professional Partners:

DSP
MUTUAL FUND



INSTITUT
ROSENBERG
THE ARTISANS OF EDUCATION®

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A Patni Family & Campden alliance

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