

# Campden Family Connect

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

In Association with:



**Integrow**  
Asset Management

# AHMEDABAD

## ROUND TABLE

Learn. Engage. Prosper

**EXCLUSIVE ROUND TABLE FOR LEADING BUSINESS FAMILIES**

**15<sup>th</sup> June, 2023 | 4pm to 8pm**

**Hyatt Ahmedabad**

*Campden Family Connect - An exclusive network of world's leading families*

**VENUE : Hyatt Ahmedabad, Next to Ahmedabad One Mall, Vastrapur, Ahmedabad – 380015, Gujarat**

# AHMEDABAD ROUND TABLE

## AGENDA

### GROWTH OF AIFS IN INDIA & ROAD AHEAD FOR EVOLVING NEEDS OF INVESTORS

Alternative Investment Funds (AIFs) have gained momentum in India as investors look to diversify their portfolios and gain exposure to alternative assets such as private equity, real estate, and hedge funds. The AIF industry has witnessed significant growth in recent years, with AUM increasing by over ten times since 2014. Looking ahead, the AIF industry is expected to continue to grow as the market is driven by increasing demand for diversified investment options, favorable regulatory policies, and the growing sophistication of investors. As a result, Investment Management firms are expected to play a more significant role in the industry's growth.

**Ram Yadav, Founder & CEO, Integrow Asset Management**

### HOW TO CHOOSE THE RIGHT INVESTMENT MANAGER

We understand how challenging it can be to navigate the world of investments and make informed decisions about your portfolio. An Investment Manager is not just providing investment access but building trust through best practices such as being true to the asset class, avoiding conflict of interest, having appropriate checks & balances, taking investment ownership, growing trust through tech and transparency, and more. In this session, Ashish will cover key evaluation factors, questions to ask during the selection process, and common mistakes to avoid. Post this, you'll have a better understanding of how to identify the right investment manager that aligns with your investment objectives and goals.

**Ashish Mundada, Head of Commercial Real Estate (Investments), Integrow Asset Management**

### THEMATIC PEER-TO-PEER ROUND TABLE DISCUSSIONS

#### 1. Strategic Estate Planning for Effective Wealth Transfer

Estate planning is a critical process for business families to ensure the smooth transfer of wealth and management of their assets to future generations. In this discussion, promoters and nextgens will learn from their peers about the strategies they are using for estate planning as well as gain valuable insights into how other families are managing family dynamics and balancing the family's vision and mission while planning the same. This discussion will enable families to discuss best practices and approaches from very pertinent experiences, to optimally/efficiently adapt strategies that suite your individual situation, to effectively manage estate planning.

#### 2. The Impact of Technology and Innovation in Indian Family Businesses

In an ever-evolving business and economic landscape, family businesses have to stay competitive and relevant. Technology and innovative practices are being adapted in a recurring basis to stay ahead of the curve and succeed. This discussion will bring together business principals and next-generation leaders to share their experiences on such undertakings, their ROI matrix, qualitative and quantitative impact on business and more. By participating in this discussion, you will gain insight into how businesses are strategizing and using technology for future growth and to stay relevant in the evolving business landscape.

## SPEAKER PROFILES



**Ashish  
Mundada**  
*Head of  
Commercial Real  
Estate (Investments)*  
**Integrow Asset  
Management**

Ashish is the Head of Commercial Real Estate (Investments). Prior to this, he was an EVP and the Head of Commercial Real Estate and Product Head (Alternatives) at Edelweiss (India). Prior to joining Edelweiss in 2018, he was associated with BlackRock (New York) as a Director & Co-Founder of the Private Debt (Infrastructure) platform. He was instrumental in organically growing the platform into a \$8+ billion AUM global platform in 5 years from 40+ global investors. He was responsible for closing one of the largest private transactions totaling \$410 mn with an alpha of 200+ bps. Ashish has earned an MBA in Finance & Law from New York University (NYU); a MS in Electrical & Computer Engineering from the University of Maryland College Park; and a BE in Instrumentation from the Pune University with a National Merit Scholar accolade and a university rank of 4th.



**Ram  
Yadav**  
*Founder & CEO*  
**Integrow Asset  
Management**

Ram is the Founder & CEO of Integrow Asset Management and an alumnus of Harvard Business School. He is a leading proponent of India's real estate industry with a deep interest in bringing transformational change to the sector. He has over 20 years of experience in Construction, Real Estate, Banking & Investment. He has built multiple businesses from scratch. His thought philosophy is firmly rooted in multiple small steps aggregating to quantum leaps and exponential impact.

Integrow Asset Management, is India's first real estate-focused asset management company. Integrow is at the forefront of the financialization of Real Estate assets of every class and aims to democratize ownership ensuring every Indian has a Real Estate Wallet. He is also a board member of India's first listed PropTech company Aurum PropTech, which has several investments in property technology companies in areas of CRM, Blockchain, Fractionalized ownership, Metaverse, Co-Living and Co-working software platforms.

# CAMPDEN FAMILY CONNECT MEMBERSHIP

Campden Family Connect is a pre-eminent global membership network for India's Ultra-high Net Worth community, Family Business Owners and their Family Offices. Founded 2016, Campden Family Connect is the first of its kind venture between RAAAY - Mr. Amit Patni Family Office, Arihant Patni and Campden Wealth UK in the family office and family business space.

Delivering both local and global networking opportunities, Campden members are supported by globally flavoured initiatives in the form of knowledge forums, pioneering research work, progressive publication material and advanced education programs. By joining the Campden Family Connect, you gain the following benefits:

- You become a part of the global community of over 1400 family business owners, single family office principals, CIOs and large private investors
- Access to unrivalled knowledge & intelligence platform
- Proprietary research reports
- Webinars/ online communication with members around the world
- Member events, private briefings and tailored introductions to families
- Co-investment workshops and off-market proprietary deal flows
- Multi-generational education programs

To know more, write to [info@campdenfamilyconnect.com](mailto:info@campdenfamilyconnect.com)

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