

CAMPDEN MONTHLY DIGEST July 2021

Expert for the Month : "AZB & Partners"

01

Chetan Mehta On Family Office
Professionalisation And Venture
Capital Strategy

04

Beyond Business: Sayam Shah • Director,
Gold Star Diamond Pvt Ltd

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INDIAN FAMILY ALTERNATIVE INVESTMENT FORUM

Navigating the World of Alternative Investments

August 11-12, 2021 • Virtual



Main Partner:



Professional Partners:

Julius Bär
YOUR WEALTH MANAGER

FIRST GLOBAL 



SPEAKERS INCLUDE



Chetan Mehta,
Wami Capital
(Single Family Office)
(Chair of the Forum)



Shelly Hod Moyal,
iAngels



Giampaolo Parigi,
Parigi Family Office



Dr. Aarti Gupta,
DBR Ventures



Siddharth Kothari,
Om Kothari Group



Amol Sathe,
Thermax Family Office

[VIEW AGENDA](#)

KEY DISCUSSIONS

- Deep insights into the Alternatives portfolio in the current times
- Understanding the Game of Unicorns- Valuation v/s Profit & Loss
- A Global investor's journey (understanding the nuances of investing out of India)
- How a smart fund management , using cutting edge investment tech can create a permanent bull market in your portfolio
- Participate at our Co-investment workshop and get access to off market deals to co-invest with other member families

REGISTER NOW

For Sponsorship: kapil@campdenfamilyconnect.com | For Registration: info@campdenfamilyconnect.com

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Expert for the Month

Zia J. Mody

*Co-Founder & Managing Partner,
AZB & Partners*

*A Campden initiative bridging industry
topic experts & families of wealth*

How does one deal with the tough choice/decision of inducting better equipped professionals v/s NextGen into the family business?

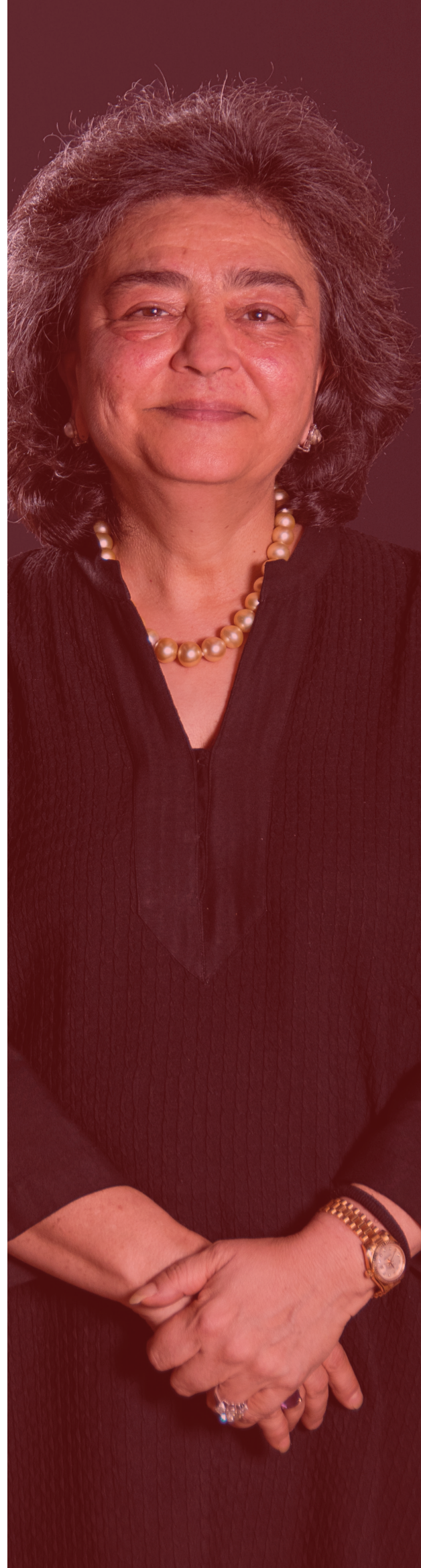
There are several examples of families who have taken the tough decision of segregating ownership and management. And it has worked wonders for some of them, where the professional management has catapulted the growth of the businesses. As one can imagine, no one size fits all and this decision is based on several factors including size of the family, the capability of the next generation to handle the business, the ability of the next generation to take the business to the next level and passion and the aspirations of the next generation.

Once a family takes the tough decision to move into a completely professionalized environment, it is obvious that the businesses will go through a transition phase. This transition phase is the most critical where professionals need to be adequately empowered. The common mistake a lot of families have made is the continued day to day interference with the professional management, rather than adopting a non-executive role purely at the board level. In addition to the focus on this transition phase, it is also important for the family members to enter into appropriate arrangements amongst themselves whether by way of family constitutions, shareholder agreements, trust structures or other similar arrangements to ensure that the professional management is supported by one voice and is not pulled in different directions.

While the above is put into place, it is also imperative to carve out appropriate roles and responsibilities for the family members who were otherwise playing an executive role in the business and for those who would aspire to participate as such. These roles could be varied – from diversification into newer businesses to building systems and processes for the professional management to philanthropy – it would all depend on the interests of the relevant family members.

What are the key factors to be considered when drafting a family constitution?

Good governance practices applied to the family as well as the business can unleash financial and economic value as well as preserve family harmony. The purpose of a family constitution is to assist with the governance of



families and the business which increasingly have diverse interests and priorities.

There are several factors to be kept in mind when drafting a family constitution such as size of the family, the capability of the next generation to handle the business, the ability of the next generation to take the business to the next level, passion and the aspirations of the next generation.

Some of the key topics which can be covered when drafting a family constitution are as follows:

- Framework for succession of the family members in the management and on the board of directors including recommended or compulsory retirement age;
- The hiring and compensation of family members employed within the organization;
- Voting in relation to family businesses;
- Composition of the family council and family business board;
- Reconciliation of interests when some family members are operationally involved and others have an economic interest without operational control in the family business;
- Providing for the education, marriage, medical and other welfare requirements of family members;
- Allocation of family wealth amongst the family members;
- Effects, if any, on the family constitution in case of birth, marriage, divorce, death of any family members;
- The policy in respect of distributions, loans or funds to the family members;
- For families which wish to carry out impact investing activities, a document delineating the Environmental, Social and Governance (ESG) goals, philanthropic values, etc. must also be set out as part of the family constitution;
- The process for resolving conflicts and disputes among family members;
- Exit clauses

Which are the most common conflicts that plague family businesses and in turn the family's harmony? What is your advice to overcome them?

Members of the family may not have equal capabilities; they may not contribute equally to the business and providing equal opportunities to all of them may be difficult. There may be differences of opinion on decision making of the organization. Disconnects can arise on who holds the top leadership position of CEO / MD. There may also be differences in lifestyle and mindset among family members, even though they live and work together.

Failing to handle such differences or ignoring them can cause them to escalate into disputes and lead to separation. Misunderstandings and miscommunication can generate mistrust and weaken the family ties resulting in erosion of wealth and causing disrepute to the family and business.

These can be mitigated by (i) communication as frequently as possible – scheduling meals, holidays etc. at regular intervals can also help in achieving frequent communication; (ii) having appropriate governance structures in place; (iii) carving out specific roles for different members of the family to avoid overlap and friction; (iv) putting in place appropriate conflict management tools and processes including a family constitution, if required. Early spotting of issues and immediate resolution would help tremendously, as issues only tend to grow larger with time and the intended resolution reaches a point of no return.

What are the possible succession plan options when one doesn't have a legitimate successor?

The legal structure of the succession plan would depend on the overall objectives of the family. For example, whether the intention is to leave the business/ estate to philanthropy under professional management, or to the closest next of kin. Here again, a testator needs to think through issues of management versus economic benefits separately.

A legal structure may then give effect to the said wishes. For example, if the idea is to have the business/ estate held for the benefit of family but managed professionally in the absence of a legitimate successor capable of managing the business, this can be done by making the relevant references in corporate documents or a shareholders agreement. A trust structure can also be considered to give limited interest or income for the benefit of the relevant successors.

Alternatively, if the intention is to contribute the assets to philanthropy, the structure would need to factor in relevant regulations applicable to charitable bequests. Such a bequest can be made either under a will, or during the lifetime of the testator, with a trust being set up and assets being contributed into it over a period of time.

Follows us on  & stay tuned for the next Expert for the Month



Chetan Mehta
Transworld Group and WAMI Capital.

Chetan Mehta, the angel investing chief strategy and investment officer of Transworld Group, will discuss how venture capital and startups are providing rewarding opportunities for family office investors as chairman of the next Campden Family Connect forum.

Chetan Mehta on Family Office Professionalisation & Venture Capital Strategy

Mehta is also chief executive of WAMI Capital, the family office of the Transworld Group family business, and is based in Dubai. At WAMI, besides managing a global portfolio of different asset classes, Mehta builds an alternate investment portfolio of venture/startups, investing in more than 25 startups across India, Israel and the United States. Mehta is also an angel investor himself with investments in 20 global startups and mentors aspiring entrepreneurs.

For WAMI, Mehta formulates the investment strategy to maximise the investment returns within acceptable levels of risk through a diversified portfolio of fixed income, global equities, real estate and alternate investments. He performs investment and portfolio management activities, from deal flow to execution.

Mehta has been instrumental in institutionalising the WAMI family office by designing its governance framework, investment policy and strategic asset allocation framework.

Ahead of his chairmanship, CampdenFB asked Mehta what he looks for as an angel investor, the sectors he is excited by and what families and startup entrepreneurs can learn from each other.

What are the key messages you want to send to families as chairman of the virtual Campden Family Connect Indian Family Alternative Investment Forum on 11-12 August?

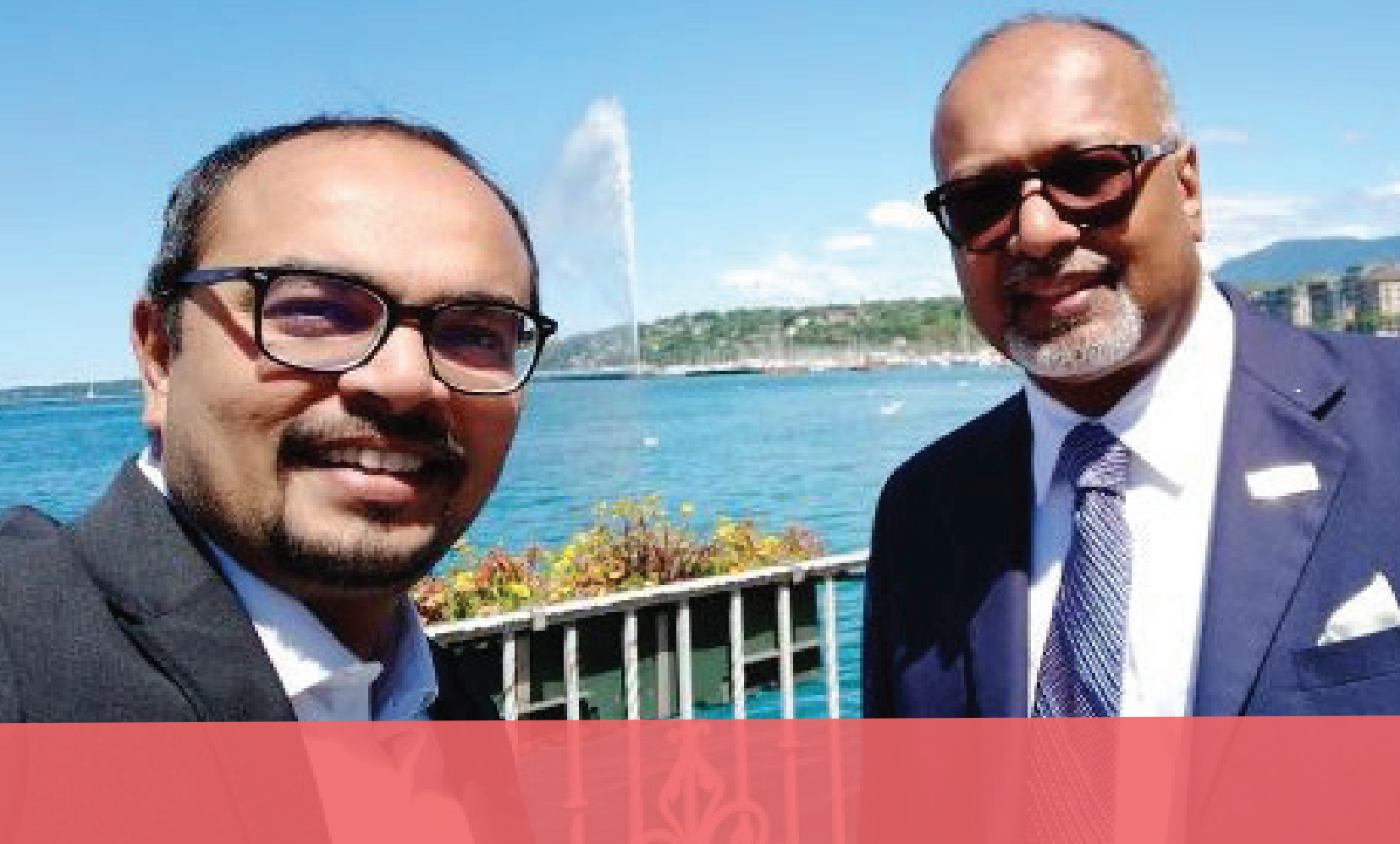
The alternative asset class constitutes almost 50% of global family office asset allocation (1). Traditionally, Indian families have had a substantial allocation to asset backed alternative investments, primarily real estate and gold. Over the years, alternative asset classes like private equity and venture/startups investments have found their way to family office portfolios. Very recently venture debt and investing in crypto have been making their case for capital allocation.

Over last few years, investing in venture funds and directly in startups have gained substantial traction. There has been tremendous increase in the number of early stage VC funds. Further various startup accelerators are now providing opportunities to retail investors to get exposure to investing in start-ups with smaller ticket sizes. However, one needs to be diligent before deploying capital given that valuations have increased, companies/VC funds accessing capital have grown multifold, exit probability is unclear and past performance and distributions from the VC/PE funds have been abysmal.

I would like to share with my peers how family offices and investors should approach this emerging asset classes of startup and VC investing. Further I believe that investing in startups provides an opportunity to work with founders and to support entrepreneurship in the country, which in turn can be a rewarding experience besides generating significant alpha to the overall portfolio.

How should family offices approach venture capital investing?

I believe venture as an asset class can add significant value to a family portfolio. Family offices who are new this asset class can start with evaluating VC funds and spread investments over two to three



funds in various themes/sectors. One should closely monitor the underlying portfolio companies and develop deeper understanding of the space. Families should seek co-investment opportunity in the startup they would like to directly participate in. Developing a good network with VC/founder community is very important. One can also participate in pitch day events of various angel networks, institutions, etc and evaluate the startups for investing directly. Families can start with relatively small allocations and diversifying across vintages and sectors. Spread your direct investments over at least 10-15 startups. Be clear of the exit time frame and the rights one should negotiate for while investing directly into a startup. Double down on your winners from your portfolio. VC/ startup investing can offer superior returns and generate alpha for the overall family office portfolio. However, one needs to allocate significant time, understand risk and be patient as one develops a portfolio of VC / startups.

What is your criteria when considering WAMI Capital investments in startups?

At WAMI, we invest in startups globally. Till date, we have made more than 25 investments directly into startups. We are sector agnostic and we proactively seek opportunities which either have an innovation or a consumption theme or both. Our investments have been in the United States, Israel and India so far. We try to look into the future and evaluate whether the portfolio company will be able to create market impact say in near future.

Some of our investments like Etoro (social trading platform), SpaceX (space transportation), Arbe (Radar technology for autonomous cars), Daily Harvest (online food tech), Capsule (Digital pharmacy), Waterfield Advisors (India's premier boutique wealth advisory firm), Sharechat (Indian social media) and Ledger (security for crypto) have been based on this thesis.

We are very bullish on India. India has a huge demographic advantage with its large, youthful population which will drive consumption over the coming decades. The entrepreneurship/startup ecosystem has matured over the last decade and exit ratio has improved significantly. New age founders are looking at building global businesses. India will see significant increase in unicorns in coming decade and we are very excited to participate in this growth story.

Which assets and/or sectors are exciting you the most as an angel investor?

Post Covid, there has been a substantial shift in how we are consuming goods and services. Further along with Aadhar, UPI,

Jio and Google Maps, Covid has accelerated growth of digital and tech enabled businesses. Healthtech, edtech, foodtech, EV, ecommerce and internet brands, fintech, robotics and cybersecurity are some of the sectors which will see increased investments. Further, agriculture and logistics are sectors in India which have tremendous scope of disruption going forward.

Are there lessons families and aspiring entrepreneurs can learn from each other?

Entrepreneurs can draw upon the rich experience of the families, who have been entrepreneur themselves, and obtain their strategic inputs. Further families can work closely with entrepreneurs and help fast track and scale up their businesses by providing them access to inhouse business skillsets and also opening doors to their network.

Families on the other hand can stay updated on the latest technologies and business models which are disrupting traditional businesses. Families and start up entrepreneurs can definitely add lot of value to each other.

What do families need to know before investing in crypto currencies and digital assets?

Crypto currencies and digital assets are here to stay. We have seen that in the last two years more managed and institutional money has entered into this space. I personally know many ultra-high net worth investors who are trading crypto. I see that we are in the midst of a transition from physical cash to digital wealth and therefore this space offers a tremendous opportunity in the years to come. It's now only a question of when will investors start looking at this space as part of their normal asset allocation process.



Families along with family office teams need to proactively educate themselves and start allocating small percentage of their capital to this space. They should consult experts and start taking small steps in building up a crypto and digital asset portfolio over a period of time. Further they should also consider investing in a portfolio of blockchain technologies. We are bullish on this space and continue to seek opportunities to invest.

What was your process in professionalising the WAMI Capital family office and what have been the outcomes?

One of my main goals after joining was to institutionalise the family office. To start with we put together family office investment and operating structure. As a second step, the governance framework and investment policy statement were

finalised. We set up the family office board and the investment committee with the intention of running the family office as a listed company with strong governance framework.

We hired professionals for key roles like accounting and reporting, investment research, etc, and we intend to expand the team to get more asset class experts. At the start of the year, we finalise the asset allocation and get feedback on the liquidity requirements of the family. We have also put together a delegation matrix so that we enable quick decision making.

What advice would you offer to non-family executives before they join a family business?

Non-family executives need to build trust and a strong relationship with the family. Further he/she needs to develop a strong communication channel with family board and investment committee. The person has to ensure that he shares his independent views on investment decisions and also introduce the family to new asset classes. The person should also educate family members on various aspects of family wealth planning including succession and wealth transfer. There has to be a focus on risk management and professional discipline while making investment decisions.

What have been the toughest family office decisions you have had to make during the Covid-19 pandemic?

During the Covid pandemic, it was important to not react to all the negative views. After studying the fundamentals of our portfolio positions, especially in equity markets, we decided to hold on to our investments and not engage in any panic selling. We in fact added few core portfolio stocks. On the venture side, we continued to invest especially in sectors which we believed would significantly benefit post-Covid.

How to Approach Gender Non-Conformity In Business Families

There are hopes that children will follow an educational legacy, to assume control of a family business, to live and holiday in communities where the family has deep roots and traditions, to marry, start a family and live within the confines of religious proscriptions.

Every generation, however, has challenges to these expected trajectories. Typically, these challenges come when a new identity construct is introduced into the family lineage. In the 1950s and 1960s, stresses to family coherence came when a member fell in love with someone outside the family's race, religion or social class. In the 1970s, 1980s and 1990s, issues of sexuality came into the fore. In these situations, rather than coupling with a person of the opposite sex, a son or daughter fell in love with a person of the same gender.

Paul Hokemeyer, JD, PhD, is an internationally renowned psychotherapist and author.

Over the last decade, a new challenge to family cohesion and a family's business legacy has arisen. This is where a child struggles with issues of gender identity and identifies as "transgendered", "gender non-binary" or "gender non-conforming".

Like past challenges, these issues are difficult for everyone involved. Sons do not come into the world expecting they will manifest gender markers of a daughter. Mothers are terrified what will happen to a daughter who is compelled to live her life as a son. Family business leaders fear economic repercussions from cultural ostracisation.

Everyone in the family finds their selves crushed by intense and uncomfortable emotions that include feeling betrayed, damaged, alone, attacked, and misunderstood. Far too often, family members are pulled into destructive behaviours as they attempt to deny or mask the pain of a truth they wish would go away or that causes their loved ones to reject them.

But wishing away or denying this reality will only cause damage to the family and push its members in disparate directions, deeper into high risk and destructive behaviours. Yes, the issues presented in gender identity are challenging, stressful and overwhelming, but when properly addressed, they can be successfully negotiated. The key to this success is implementing culturally competent psychological services that regroup the family in a respectful, properly resourced frame. Once this frame is in place, the proper assessments can be made and supportive psychological services employed.

Family business heir to heiress

Nearly two years ago I was retained to consult with a leading Asian family when the eldest son of the family's business leader, embarked on a course of self-destruction after announcing to his parents his intentions to transition to a woman. The family, highly visible in their country and deeply Christian in their beliefs, had a highly emotional reaction to his announcement. They threatened to disown and cut him off from his financial resources, spewed damning religious rhetoric and told him he was unlovable.

I entered the family system in the midst of this chaos and division not to change anyone's mind, but rather to move the family from a



Paul Hokemeyer
JD, PhD, Internationally renowned psychotherapist
& author.

Parents of all social classes want their children to be happy and safe, to find a path that nurtures and supports them as they find a meaningful place in the world. In families where there are substantial financial resources, these expectations tend to mirror a distinct set of cultural norms.



place of emotional reactivity to a strategic course of action that was grounded in logic, science and cultural realities.

In this regard, my first order of business was to honour every person in the family's position on the issue of gender and queer identity while creating a culturally respectful and clinically relevant frame within which the family could process the experience.

Over the years that I've dealt with these issues, I've found this frame needs to contain the following four elements:

1. An understanding of the science on gender and the clinical diagnosis of Gender Dysphoria.

It's important to know that gender is different from sex. A person who identifies as transgender or gender non-conforming lives with a sense of self that is described by the clinical term, Gender Dysphoria. For these people, their sense of self conflicts with their biological sex. The weight of this dissonance between how they feel and how they look becomes a burden that overshadows their life, drains the joy from it, diminishes their sense of self and prevents them from having meaningful connections with other human beings.

2. A generous timeline and structured process to sort out the intense emotions that arise from the new reality.

The adage, 'time heals all wounds' is one that is highly applicable to resolving the issues that arise from Gender Dysphoria. Research has shown that when the family recognises and honours that it—in addition to the individual who suffers from the diagnosis—has a distinct process of dealing with the family member's identity transition outcomes are exceptional. But this process, takes time. The family will not find a new equilibrium in a few months or even a year. It will come slowly, and haltingly. There will be steps forward, steps back and even sideways. Resolution will come provided there is an articulated path and an overarching commitment towards family well-being.

[Read Full Story](#)

Managing Wealth as a Business: A Family Office - To Be Or Not To Be?



Charlotte Evans Tripping
Senior associate in the private client
team of Forsters LLP.

What are some of the key legal considerations that family offices need to consider when structuring investments in a post-Covid world? How have wealth-holder responsibilities and priorities changed within this new era?

For investment professionals working in a family office, ensuring they have the proper regulatory authorisation to provide investment advice is essential. However, they will not be held to the same strict legal obligations as fiduciaries, such as trustees when investing, and family offices are not regulated in the same way as banks and private equity funds. Arguably this may give the family office wider scope to consider different asset classes and investments. Therefore, the emphasis for a family office should be to understand the investment mandate from the principal and family. Once the family office is clear on this, these commitments can be built into legal documents as necessary.

James Brockhurst is a senior associate in the private client team of Forsters LLP. Once the legal documents are instituted—whether these include a trust deed or bespoke articles of association—family office principals will find themselves working within a framework which may contain complex investment rules. Every structure is unique, and if a family office fails to follow the procedure within a trust deed or other instrument (for example, if a required consent is not obtained for a particular transaction), the family office will be accountable to the family.

In certain scenarios, family office principals may also find themselves in positions of authority, such as investment adviser or chief financial adviser, in some cases with fiduciary duties, so could be at risk of a breach of trust if they fail to follow investment procedure. In other cases, family office principals may be subject to contractual provisions on investments in their employment contract.

Implementing good governance within the family office is also key. That might include ensuring the family office takes the right advice from a third-party expert if it does not have the relevant in-house investment capability. Also, the family office should maintain an appropriate overview of the investment strategy, which might mean getting third-party assistance to give an impartial view. Overall, this means properly balancing in-house and external management.

Post-Covid considerations for the family office

If the pandemic has required significant changes to investment strategy and/or has impacted the level of returns, the family office should meet the principal and family to manage their expectations. Also, the family office should consider whether any re-structuring may be appropriate for tax and/or other jurisdiction-specific reasons if asset values are low.

Looking forward to a post-pandemic world, family offices will likely want to review the existing investment strategy. Jurisdiction-specific responses to the pandemic may have affected assets—for example, rental income or the ability of underlying businesses to trade may have been impacted by social distancing and lockdown measures—how will this affect investment strategy if and when these restrictions are eased?

Conflicts in the post-Covid world: ESG vs Crypto

The post-pandemic world has brought new subjects centre-stage. ESG (environmental, social and governance) is an increasingly



James Brockhurst
Senior associate in the private client team of Forsters LLP.

important priority for some families, and many G2 and G3 family members have recognised that, in their lifetimes, they will have a moral duty (and potentially a legal duty, in due course) to structure their family's investment policy in an ESG-friendly way.

Most banks have already adopted 'green' platforms. Family offices, while more private and less regulated, may come under increasing pressure from the public (if not the law) to play their part, so many will feel they need to be "ESG ready".

Crypto-assets provide an interesting example of where ESG and investment objectives could come into conflict. Some families will have considered whether to take crypto positions in the post-pandemic digital world. However, they must also square the environmental impact of crypto investment with their ESG policies. The current energy-intensive method by which most blockchains run—namely "proof of work"—presents real questions as to whether crypto-assets are compliant with ESG policies. Other families may decide to wait until blockchains have migrated to the more environmentally-friendly "proof of stake" systems before investing, or limit investment to "green" crypto platforms such as Cardano.

Crypto is just one example of a sector that could present ESG dilemmas. Others, from aviation to oil and gas to mining, will raise similar issues.



Sayam Shah

Director

Gold Star Diamond Pvt Ltd

BEYOND BUSINESS

Your Favourite Destination?

Eastern Europe

Your Fitness Mantra?

My body is my temple

What is your best way to unwind after a long day of work?

Spending time with my baby boy!

The one Quote you live by?

Live and Let Live

Who is a person you look up to and Why?

My Grandfather, because he taught me to be honest, loyal and dedicated to work

What's next on your bucket list?

Roam the world with my boy

Campden Global Webinars

Campden Wealth

Membership | Events | Research | Education | IPI

European Family Investment & Alternatives Meeting

June 8 - 10, 2021

Spread across 3 days, this virtual forum focussed on how family offices should be thinking about the post pandemic investment environment. The meeting hosted geographic and sector experts as well as family office allocators who shared their stories and experiences.

Campden Family Connect

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

CFC Member Meet

June 18, 2021

Amit Patni, Director, Campden Family Connect hosted India Members virtually for an evening of networking over investment conversations. Members shared what their current investment portfolio looks like, their preferred asset classes, allocation metrics as well as global exposure.

Campden Wealth

Membership | Events | Research | Education | IPI

European Family Office & Investment Forum

June 23- 24, 2021

Campden Wealth successfully hosted the 22 nd Family Office & Investment Forum, marking its return to in-person events in Europe following the disruptions caused by Covid-19. The 2 day event explored and addressed key macro-economic, social, political and geographic challenges that shape the portfolio and strategies of today's family offices and aimed at helping family offices develop and build a robust investment strategy in tune with opportunities and threats foreseen in 2021 & beyond.

ars & Forums: June 2021



Tax Planning for the Affluent

June 28, 2021

IPI member Ron Weiner led this session designed for members to think about their own tax and trust planning, the best people to help execute those plans, impending changes, and opportunities from the tax proposals and also discussed all tax, trust, and planning concerns.



Digital & Social Infrastructure

June 30, 2021

In a regular series focused on real assets with CIM we return to Infrastructure. This time the session focused on Digital and Social Infrastructure covering the growing need to invest in infrastructure assets and platforms.

Campden Global Webinars & Forums: July 2021

8
July

European Virtual Fund Meet
Campdem Wealth

*Interview With Derek Handley -
Investing For The Future*
Institute of Private Investors

9
July

*The Race for Indian Goldmine-
Unicorn Club*
Campdem Family Connect

13
July

*NextGen Series Engaging With
Your Family Office*
Institute of Private Investors

15
July

IPI Needs & Leads

23
July

*Succession planning: Ensuring the
continuity of business & wealth*
A CFC-Julius Baer webinar series

ABOUT US



Campden Family Connect (CFC) is the pre-eminent membership network for India's Ultra-high Net Worth Community, Family Business Owners and their Family Offices. Founded in 2016, CFC is the first of its kind venture between RAAY – the Amit Patni Family office, Arihant Patni and Campden Wealth, 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.

What distinguishes this community is the membership criterion that enrolls only Family business Principals, CIOs of Single Family Offices, NextGen family members and Large Private Investors. With the acquisition of Institute for Private Investors (IPI) - the Campden global community today comprises of over 1400 members across 37 countries.

A journey of more than 3 decades...

The global private wealth community has evolved into an intricate web of international, multigenerational business owning and financial families, family enterprises and family offices. Successfully managing the interests of ultra-high net worth families requires a consistent focus and an on-going communication.

Founded by Samuelsons Family Office in 1987, Campden Wealth UK has supported these families and their businesses by operating at the forefront of innovation and best practice in wealth management. It has provided unrivalled knowledge and intelligence to the world's wealthiest families, their family office and ultra-high net worth investors through peer-to-peer networking, proprietary ground-breaking research and cutting edge magazines.

Campden further enhanced its international reach and community in 2011 by acquiring the Institute for Private Investors (IPI), a leading membership body of private investors in the United States, established in 1991. In 2016, Campden's Indian arm of operations Campden Family Connect Pvt. Ltd. was founded and carefully nurtured under the thought leadership of the renowned Patni Family.

Today, Campden globally has delivered over 400 events hosting more than 25,000 families and has built a trusted reputation of delivering exclusive private forums that are led by families, for families, on families across Europe, USA, Asia and the Middle East.

ABOUT CAMPDEN FAMILY CONNECT

A Global Community of over 1400 Members
across 5 Continents and over 37 countries



ANDORRA

GERMANY

NIGERIA

ARGENTINA

GUATEMALA

SAUDI ARABIA

AUSTRALIA

HONG KONG

SINGAPORE

INDIA

ISRAEL

ITALY

KUWAIT

BELGIUM

BRAZIL

CANADA

SWITZERLAND

UAE

UNITED KINGDOM

UNITED STATES

CONGO

FINLAND

FRANCE

LEBANON

MEXICO

NETHERLANDS

EGYPT

AND MORE...

CAMPDEN CLUB 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 in 2016, Campden Family Connect is the first of its kind venture between RAAY – the 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 Club, you gain the following benefits

- You become a part of the global community of over 1400 Family Business Owners, Single Family Office Principals & Executives 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

STRATEGIC PARTNERSHIP

Campden Family Connect offers a unique and strategic partnership opportunity that will enable a select group of professional advisory firms to benefit from establishing a campaign with Campden in India and position themselves in front of our community of families and family offices with a consistent presence and message. This partnership can be availed by advisory firms from various areas of specialisation such as Banks, Wealth management, Asset management, Insurance, Real estate, Law firms, Business schools, Consultancies, Lifestyle agencies etc.

Benefits	Title	Associate	Supporting
Exclusive partnership	✓		
Branding in all event promo collaterals to our UHNW communities across India and globally.	✓	✓	✓
Branding in virtual delegate handbook - Corporate logo - Corporate profile (500 words) - Speaker profile (1)	✓	✓	✓
Complimentary registrations (including Speaker)	4	3	2
Qualified guest invitations	5	3	
Visibility for Speaker/company presentation - Circulated amongst all registered delegates - Hosted on Member Link/ CFC website	✓ 12 months	✓ 6 months	✓ 3 months
Speaker slot timing (including QnA)	40 min Presentation/ Fire-side chat/ Panel discussion	30 min Presentation / Fire side	15 min Only presentation
1 full paged authored articles in Campden Monthly Digest	✓ 2 editions	✓ 1 editions	
LinkedIn promotion (pre or post summit)	3	2	1
Pre-conference exposure to delegate list	✓	✓	✓

To know more, contact

Kapil Divadkar | kapil@campdenfamilyconnect.com

As a Campden member, you may avail the following exclusive benefits listed below from our premium brand partners

- Save 10% on WeWork day passes. Valid for one-person per day across any of the 35 WeWork locations present in 6 cities in India.
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- Save 34% on WeWork All-access, a monthly membership which gives you access to WeWork locations across 150+ cities globally.
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BENGALURU AT EMBASSY ONE

- Avail special offers on Gym Memberships & Spa Packages
- Indulge in 15% savings on Food & Soft Beverages in the outlets or in-room dining. Complimentary dessert while dining at any of our outlets
- Complimentary glass of Sparkling Wine on special occasions
- Unwind with 15% savings on Bed & Breakfast rate for Superior, Deluxe, Premier Rooms as well as Four Seasons Executive Suites
- The above mentioned offers are applicable at Four Seasons Hotel Bengaluru only

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**For more information please visit our website or
Contact Janhavi Desai - +91 90040 86579
janhavi@campdenfamilyconnect.com**

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Enjoy 15% savings on Rooms & Suites at Oberoi

Indulge in 15% savings on Food & Beverages at the on-property restaurants and bars or in-room

Unwind with 20% savings for resident guests at

[Click here to make reservations at Oberoi](#)



TRIDENT
HOTELS

- Enjoy 15% savings on Rooms & Suites at Trident Hotels.
- Indulge in 15% savings on Food & Beverages at the on-property restaurants and bars or in-room dining.
- Unwind with 20% savings for resident guests at the hotel spa.
- [Click here to make reservations at Trident Hotels](#)

As a Campden Member, you may avail preferred terms offered by AZB & Partners. To know more, please write to anand.shah@azbpartners.com

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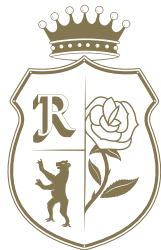
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