

Celebrating



Campden Family Connect

Exclusive Network of World's Leading Families
Over 1400 Members across 5 Continents &
more than 37 countries



ANDORRA	HONG KONG	BRAZIL	FINLAND
GERMANY	SINGAPORE	CANADA	FRANCE
NIGERIA	INDIA	SWITZERLAND	LEBANON
ARGENTINA	ISRAEL	UAE	MEXICO
GUATEMALA	ITALY	UNITED KINGDOM	NETHERLANDS
SAUDI ARABIA	KUWAIT	UNITED STATES	EGYPT
AUSTRALIA	BELGIUM	CONGO	AND MANY MORE

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 RAAI – 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.

WORDS FROM THE BOARD



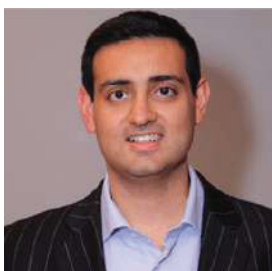
Amit Patni

"Campden Family Connect has completed 4 years in India and we have been on a steady growth trajectory since inception. During the recent crisis, we kept our global members connected & engaged and provided unrivalled knowledge that helped Family Businesses and Family Offices stay one step ahead. The over-whelming response received only reinforces our belief that we are on the right track."

"We are delighted by the robust growth of the Campden Family Connect membership in the past year. Doubling in size during the pandemic has clearly demonstrated the value families and family offices derive from best-practice learnings and aligned connectivity to their global peers, in a safe harbour environment."



Dominic Samuelson



Arihant Patni

"Since inception in 2016, Campden Family Connect has grown from strength to strength; helping Families stay connected, personally and professionally, and share each other's experiences. The recent crisis only reiterated the importance of peer-to-peer learning and our value offering was well recognized even during times of uncertainty. As we grow, we aim to continue delivering a secure & trusted networking platform to India's family business owners, family office principals and large private investors."

"We realized the opportunity in India. The desire for Indian families to engage on a global level and the ability for us to deliver best practice education and business relationships is why we created Campden Family Connect. We are delighted to be partnering with the Patni family, who have been pioneers of the Family Office space in India, since 2002"



Henry Samuelson

FOREWORD



Amit Patni
Director

It has been a memorable 2020 that showed the survival of those who adapt and innovate. Taking each day as it comes, we definitely tided over the toughest phase in our lives with a bag full of learnings for a lifetime.

In 2020, life @CFC was busy. With a founding business objective of peer-to-peer networking, the year gone-by saw us pivoting and going digital, delivering virtual knowledge forums. Our 90+ global webinars and 3 virtual India annual flagship forums addressing a wide range of relevant topics helped our Member community stay engaged with each other. We hosted our flagship forum – Indian Family Alternative Investment Meet- virtually for the first time followed by Indian Families in Business Meeting and now Indian Family Office Meeting. The constant & consistent strong & positive response we are receiving indicates the value significance as seen by Families too, in staying connected and learning from their peers. ‘Going Digital’ has enabled us to keep our Members more engaged as it provided access to global content, in the comfort of one’s home-based work desk. It also helped us

grow in reach, on boarding new Members & Speakers from across geographies, who brought their perspectives and knowledge to our forums. We also launched Campden monthly digest to keep the community abreast on our activities while also featuring global families’ learnings.

As we complete 4 successful years in India, I would like to thank our Members, Partners and Speakers who have played a key role in this growth as much as the efforts of the team.

As we enter the first New Year of the #NewWorld hoping things would get back to normal soon, Campden will continue delivering unrivalled and tailored knowledge through various innovative formats.

Till then stay tuned, stay connected, stay engaged!

The year 2020 has been a very strange, peculiar and unpredictable year as we all know. The corona virus that emerged in December 2019, soon spread everywhere all over the world and by March 2020, the entire world was locked down, with heavy restrictions on movements.

Given our business model that is based on peer-to-peer networking, the lockdown had its fair share of impact on Campden as well. However it did not take us much time to adapt to the new ways of life and go completely digital. As we started hosting online webinars, we saw a great turnout from the community, not only nation wide but also all across the world. This was actually a great way for our community across all nations to interact with each other.

Our annual flagship forums, that were hosted virtually, received a great overwhelming response. Breakout rooms to conduct networking sessions amongst our participants continued the enablement of peer-to-peer networking.

Campden Family Connect not only responded to the new situation promptly, it’s all geared up as well for the #NewWorld.



Ayushi Patni
Director



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
- Multi-generational education program

To know more, write to
info@campdenfamilyconnect.com

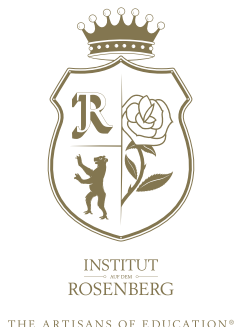
CORPORATE MEMBERSHIP

Campden Family Connect has introduced Corporate Membership, an annual strategic engagement plan for a select group of professional advisory firms. Campden Club Corporate Members will derive value and return on investment by virtue of the following:

- The opportunity to meet family business owners/ Principals of Single Family Offices/ Large Private Investors
- Access for the Ambassador and 1 executive to attend all the three forums
- A 12 month membership providing an opportunity for a planned and strategic engagement at CFC's annual flagship knowledge forums
- Educate the Campden team with insight into the firm's services and objectives in order to facilitate value driven connectivity and opportunity.
- Participation at India's most sought after Family Business / Alternative Investment / Family Office knowledge forums
- Branding at event venue, delegate handbook and CFC website.
- Opportunity to participate in each of the forums in any of the pre-decided Speaker roles- keynote /panellist / round-table chair
- Access to Member link and opportunity to post a white paper or research therein on a monthly basis.
- Appoint a Campden Ambassador within the firm who would be embedded in and familiar with Campden community.
- Complimentary invitations for up to 5 qualifying client guests per members' forum.

To know more, contact
Kapil Divadkar | kapil@campdenfamilyconnect.com

OUR PARTNERS



KEY SPEAKERS AT INDIAN FORUMS



Ameera Shah



Anant Goenka



Anu Aga



Aditi Kothari Desai



Gopal Srinivasan



Habil Khorakiwala



Kuldip Singh Dhingra



M V Subbiah



Niranjan Hiranandani



Nisaba Godrej



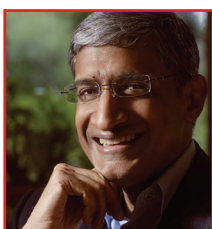
Rakesh Jhunjhunwala



Ramesh Ramakrishnan



Samina Vaziralli



Shiv Khemka



Skreevar Kheruka



Suneeta Reddy



Sunil Kant Munjal



T Mohandas Pai



Zarina Screwvala



Zia Mody

KEY SPEAKERS AT GLOBAL FORUMS



Alan Airth
Mars Incorporated



Alex Bhathal
Sacramento Kings &
Raj Capital



Anousheh Ansari
XPRIZE



Aswath Damodaran
NYU



G Garvin Brown
IV-Brown Forman Family



Jamie Cornell
Cornell Enterprises



Jeff Immelt
GE Venture Partner at
NEA



John Phelan
Michael Dell Family
Office



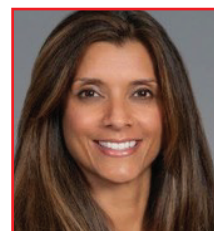
Kristina Blahnik
Manolo Blahnik



Muhammad Alagil
Jarir Group



Octavian Pilati
Sub Umbra



Rupal Poltack
Walton Enterprises



Salman Khan
Khan Academy



Tim Draper
Draper Associates



Tim Kopra
Ex-NASA astronaut



Valerie Rockerfeller
Rockerfeller Brothers
Fund

2020 ANNUAL FLAGSHIP FORUMS

Indian Family Alternative Investment Forum (Virtual)

August

SPEAKERS FOR THE MEETING



Yash Poddar
Vikas Poddar Family Office



Derek Handley
Aera VC



Gopal Srinivasan
TVS Capital Funds Ltd



Guneet Banga
The Caravel Group, Aera VC



Mark Matthews
Julius Baer



Murali Krishnan
Kolte-Patil Family Office



Princess Jahnvi Kumari Mewar,
Hukum Raj Legacy, JPM Capital



Raman Chandna
Sona Group Family Office



Dr. Ruchi Dana
Dana Group, UAE



Alan Gemmell
Department for International Trade



Harsh Dhanuka
SAR Group Family Office



Kunal Palta
Pankaj Munjal Family Office



Laura Demetris
Department for International Trade



Patrick Tsang
Tsangs Group



Rishi Gupta
Golden Alpha Pte



Sunil Dhall
Bhansali Family Office

Campden Family Connect successfully hosted and concluded the 2nd edition of Indian Family Alternative Investment Forum. Chaired by **Yash Poddar**, Investment Strategist, **Vikas Poddar Family Office**, the virtual summit was organized for 2 hours across 2 days. Attended by more than 80 participants, the summit discussed various topics pertaining to alternative investments. Guneet Banga, Caravel Group moderated a discussion with **Princess Jahnvi Kumari Mewar**, **Hukum Raj Legacy**, and **Raman Chandna**, **Sona Group Family office**, on their views on alternative investments while **Murali Krishnan**, **Kolte-Patil Family Office** along with **Gopal Srinivasan**, **TVS Capital Funds**, and **Ruchi Dana**, **Dana Group**, discussed the VC investments space- performance, outlook and evaluation processes. Sessions by **Derek Handley** of **Aera VC** and **Mark Matthews** of **Julius Baer** on sustainable start-ups and macro-economic

outlook in Asia respectively, provided the global perspectives that Families were seeking.

The 2nd day had topics covering international investment opportunities. **Alan Gemmell** and **Laura Demeteris** from **Department of International Trade** threw light on the investment opportunities in UK. CIOs from large single family offices- **Kunal Palta**, **Pankaj Munjal Family Office**, **Harsh Dhanuka**, **SAR Group Family Office** and **Sunil Dhall**, **Bhansali Family Office**- discussed AIF as an asset class in detail, paving way for a highly engaging, informative and insightful discussion. Perspectives of global family offices on alternative investments and outlook were covered in a fire-side chat between **Patrick Tsang**, **Tsangs Group** and **Rishi Gupta**, **Golden Alpha**. Pre-summit networking forums on both the days helped the participants meet & greet their peers and gear-up for the summit.

We would like to thank our partners **Julius Baer**, **DIT - British High Commission**, **Aera VC**.

2020 ANNUAL FLAGSHIP FORUMS

Indian Families in Business Meeting (Virtual)

October

SPEAKERS FOR THE MEETING



Ramesh Ramakrishnan
Transworld Group
(Chair for the forum)



Dilip Piramal
VIP Industries



Dr. Aarti Gupta
DBR Ventures
(Jagran Family)



Perizaad Zorabian
Zorabian Chicken



Zia Mody
AZB & Partners



Shiv Khemka
SUN Group



Ameera Shah
Metropolis Healthcare



Aditi Kothari Desai
DSP Investment Managers



Darshan Hiranandani
H-Energy Global



Janak Sarda
Deshdoot Media Group



Kalpen Parekh
DSP Investment Managers Pvt Ltd



Janak Mehta
FRR Immigration



Jeff DeCicco
Canam Investor Services



Abhinav Lohia
Canam Investor Services



Jitendra Singh
JK Cement



Avadhut Parab
Wockhardt Ltd.



Satyanarayana Kasturi
Ashok Piramal Group

Hosted in a highly private and confidential setting, this virtual forum deliberated on how Families would be running their businesses in the #NewWorld- right from re-aligning strategies to retain legacy, adapting digital transformation to exploring the future of WFH culture. Along with interactive pre-summit networking, the forum also included engaging break-out sessions on topics of current concerns. Themed on 'Achieving Longevity', the 2 day forum was chaired by **Ramesh Ramakrishnan**, Chairman, **Transworld Group**. In his inspiring keynote, he shared the journey of Transworld- from a Shipping Agency in Mumbai to a global shipping and logistics service provider. This was followed by a panel discussion where **Dr. Aarti Gupta**, **DBR Ventures**, **Dilip Piramal**, **VIP Industries** and **Perizaad Zorabian**, **Zorabian Chicken** discussed strategies to retain family business legacy. The summit also had expert sessions by **Kalpen Parekh** from **DSP Investment Managers** who gave tips to avoid making emotional financial investments, **Zia Mody** from **AZB & Partners** on protecting one's wealth in uncertain times and representatives from **Canam Investor Services** and **FRR Immigration** who articulated the process of acquiring US green card via investments. Families also shared their sentiments and business implications of WFH culture. Moderated by **Aditi Kothari Desai**, **DSP Investment Managers**, the panel had **Janak Sarda**, **Deshdoot Media Group** and **Darshan Hiranandani**, **H-Energy Global** share their inclination towards adopting WFH in the #NewWorld. An expert panel of CTOs from large family businesses also discussed the technology transformation and future of enterprise technology.

Shiv Khemka, Vice Chairman, **Sun Group** shed some light in his keynote speech about entrepreneurship in a global family business and his passion for mentoring NXG in the start-up space and managing the family foundation. We also had **Ameera Shah**, Promoter & Managing Director, **Metropolis Healthcare** discuss her business learnings and her strategies that helped overcome challenges in retaining market leader position.

We would also like to thank our partners **DSP Investment Managers**, **AZB & Partners**, **Canam Investor Services** & **FRR Immigration** and **Institut Auf Dem Rosenberg**.

2020 ROUND TABLE

Chennai Round Table

March



CFC kick-started 2020 with an exclusive forum for ‘Families in Businesses & Family offices’ in Chennai. Designed to help Families understand the Family Office eco-system and explore building a VC portfolio, this half-day program hosted 25-30 members from the Campden community in a highly private and confidential setting. Our strategic partner- Northern Arc delivered the opening session on including private debt as an asset class in investors’ portfolios. **Ravi Vukkadala**, Chief Executive Officer, **Northern Arc Investment Managers Private Limited**, presented how curated credit outperforms traditional investments. This was followed by a panel discussion on ‘Demystifying Family Offices’. Moderated by **Vikram Desai**, President, **DSP Group** moderate a discussion with **Gopal Srinivasan**, Chairman & Managing Director, **TVS Capital Funds**, **K. C. Ganesh**, President, **Prayog Advisors** and **Rohinton Bharucha**, President & Chief Executive Officer, **Patni Financial Advisors**, the panel discussed on the different types of Family Offices, CAPEX involved and benefits gained. This was followed by a fire-side chat between **Anirudh Damani**, Managing Partner, **Artha Venture Fund** and **Chaitanya Deshpande**, Chief Investment officer, **Sharrp Ventures** who discussed on their respective approaches towards building a VC portfolio. The evening was concluded with a networking cocktail.

We would also like to thank our partners **Northern Arc Investment Managers Private Limited**.



2020 WEBINARS

Inaugural session

April



Campden India kick-started the webinar series with its inaugural meet & greet session hosting family business owners, family office principals and large private investors- from across India. Moderated by Campden team, this highly private & by-invite only session brought the industry leaders together wherein they shared their situation, strategies and the actions they have taken to work around the unexpected outbreak.

Restructuring portfolio

April

In the wake of global volatility stemming from market uncertainties, family offices and UHNIs have been avidly exploring to restructure their portfolio so as to minimise risk. As a topic expert, **Kalpen Parekh**, President, **DSP Investment Managers Pvt Ltd**, gave direction and guidance to the Campden Community in terms of market outlook and basic rules of investing. He emphasized that when investing one should minimise the chances of going wrong by studying failures and using the rule of elimination to manage risk. He even recommended an ideal portfolio mix comprising- Indian Equities, global funds, short term debt funds and hedge funds.



Kalpen Parekh

Steering through crisis

April



Vinati Saraf



Amit Patni



Sahil Kejriwal



Saurabh Dhawan



Siddharth Kothari

A webinar aimed at understanding how Family Businesses and Family Offices are dealing with lockdown, this session witnessed participation from industry leaders such as **Vinati Saraf**, MD & CEO, **Vinati Organics**, **Amit Patni**, Director, **RAAI Global Investments**, **Sahil Kejriwal**, Director, **GSE Renewables**, **Saurabh Dhawan**, Director, **SSF Plastics** and **Siddharth Kothari**, Chief Investment Strategist, **Om Kothari Group**. The Families shared their best practices in terms of financial resilience, managing remote workforce and continuing to run operations in times of disruption. Labelling COVID19 as a “Black Swan” event, Families concurred that this downtime can be leveraged to innovate & invest. While a few are exploring investments in R&D and technology, most of the Indian family businesses have not opted for salary/wage cut for their employees/workers as they view this as a morale booster and motivation for employees to stay loyal. As most businesses eagerly wait to resume operations, the interim period has seen office staffs adapting to the new norm of working from home, heavily relying on digital tools for connectivity. Family Offices, on the other hand, are staying active and looking at US equities as an investment option in such times.

2020 WEBINARS

Mental health & well-being during global trauma

April

In addition to visible impact on business operations, physical movement, economic downfall, the element of uncertainty has paved way for fear and anxiety triggering strong emotions in adults and children alike. Though it can be overwhelming, it's important to manage stress during such testing times. This need-of-the-hour topic had **Rajvi Mariwala**, Director, **Mariwala Health Initiatives** provide a framework and coping techniques to ensure positive mental health and well-being. Moderated by **Arihant Patni**, Managing Director, **Patni Financial Advisors**, this webinar highlighted that good physical health is achieved and sustained by good mental health. It urged participants to check one's triggers of stress and adopt a tailored grounding/coping technique to be more self-aware such as focus on things around you, be mindful when doing any activity etc. Rajvi also emphasized on providing emotional support to elderly relatives and creating a conducive atmosphere for kids, so as to help them too cope with this situation.



Rajvi Mariwala



Arihant Patni

Investment opportunities in Emerging Market- India

May



Navneet Munot

The recent escalation of the Corona virus and subsequent global lock-down has created an environment not seen before. With volatile markets across the world and despite the gradual recovery observed in the past 1 month, stock market participants often have diverging views on investments. To throw light on the performance of equities and provide an outlook for investment opportunities, CFC invited topic expert- **Navneet Munot**, Chief Investment Officer, **SBI Mutual Funds** to address this webinar session. In addition to providing an overview of India equities, Navneet also highlighted the strategies for investments- recommended equities, % of asset allocation and promising sectors to park the wealth. The session was highly engaging with more than 40 participants from across the world logging in and interacting on the Indian equity market.

Indian Real-Estate and its future

May



Abhishek Goenka



Abhinav Reddy



Irfan Razack



Raj Menda

Moderated by **Abhishek Goenka**, CEO, **CoWrks**, and in conversation with real-estate tycoons- **Abhinav Ram Reddy**, **GAR Corp**, **Irfan Razack**, **Prestige Group** and **Raj Menda**, **RMZ Corp**, this webinar discussed the impact of COVID19 on the sector and investment opportunities therein. The veterans deliberated on how they managed business and cash flow in a time of complete stillness and the trends expected once the market resumes. While commercial real estate will be the apple of the eye for the investors, residential sector too will see demand in the coming times for this lockdown definitely made many realize the value and need of a decently spaced home. According to Irfan, there should be no new supply till the current inventory is not exhausted. Warehousing was also a sector predicted to watch out for.

2020 WEBINARS

Living in the #NewWorld - Leaders' Learnings

May



Amit Patni



Abhay Mangaldas



Shreevar Kheruka



Shrenik Ghodawat



Suresh Chitturi

Famously labelled as the Black Swan event, the pandemic has given birth to new norms and redefined the ways of living for a long term. This session had industry thought leaders such as **Abhay Mangaldas**, Founder and Director, **The House of MG**, **Shreevar Kheruka**, CEO, **Borosil Ltd.**, **Shrenik Ghodawat**, Director, **Sanjay Ghodawat Group** and **Suresh Chitturi**, Chairman & Managing Director, **Srinivasa Farms Pvt. Ltd.** participate in a candid conversation with **Amit Patni**, Director, **Campden Family Connect** on their personal learnings from the lockdown and how each of them was adapting to the #newworld. This panel brought together family Principals and NextGen discussing how they managed family, business and personal care during this testing.

Strategic Philanthropy: Transforming the Way Families Give

June



Neera Nundy



Amit Chandra



Dhruv Khaitan



Rumana Hamid

The pandemic outbreak has had cascading effects on India's socio-economic growth. The current situation calls for bold interventions, without which the country's fight against poverty would be pushed back by more than a decade. All this has made strategic philanthropy even more critical to support the government and also to achieve positive and sustainable changes. On this webinar, CFC and Dasra invited active and passionate philanthropists- **Amit R. Chandra**, Chairman, **Bain Capital India Office**, **Dhruv Khaitan**, Chairman & Founder, **NeoGrowth** and **Rumana Hamid**, Managing Trustee, **Cipla Foundation**- to share with the Moderator, **Neera Nundy**, Co-Founder & Partner, **Dasra**, their respective philanthropic journeys, contributions during this crisis and learnings/ advice for Families who are on the cusp of giving.

2020 WEBINARS

Riding the Tide: Perspectives from Family Offices

June



Chetan Mehta



Amitabh Chakraborty



Nirali Solani



Sonali Thapar

The recent escalation of the Coronavirus pandemic and subsequent global lock-down has led to uncertain and unsettling times. Families are closely monitoring their wealth now, more than ever before and probably revisiting their financial goals. CIOs from leading single family offices- **Amitabh Chakraborty**, MD & CIO, **Kitara Capital**, **Nirali Solani**, Director, **Chona Family Office** and **Sonali Thapar**, Director, **TCAP Investments**- shared their strategies and outlook on managing the families' wealth with the Moderator- **Chetan Mehta**, Chief Strategy Officer, **Transworld Group**

Effective Brand Communication: The Growth Catalyst For Your Family Business

July



Josy Paul



Ashish Bhasin

The world of branding is changing. Today businesses across industries and verticals are required to be creatively sensitive so as to make an impact on the stakeholders- customers, employees and even service providers. This session highlighted best practices in retaining, building and enhancing family business's goodwill and brand equity by leading Industry Experts- **Josy Paul**, Chairman and Chief Creative Officer, **BBDO India** and **Ashish Bhasin**, CEO-APAC & Chairman India, **Dentsu Aegis Network**.

In conversation with Kuldeep Singh Dhingra

July



Sonu Bhasin



Kuldeep Singh Dhingra

Moderated by **Sonu Bhasin**, Founder, **FAB**, this session had **Kuldeep Singh Dhingra**, Chairman, **Berger Paints** share his entrepreneurial journey- what worked, what didn't, dealing with crisis, succession planning, way forward, and his personal learnings too. Kuldeep is the 4th gen member of the Dhingra family and has over 50 years of experience in paints and related industries. He and his younger brother are ranked amongst the top 21 in the Forbes List of Richest Indians. Berger Paints is amongst the leading Paint producers globally and top 5 in Asia.

2020 WEBINARS

"How To Best Communicate In A Family System" By Philippe Weil

September

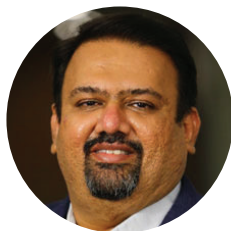


Philippe J. Weil

In conversation with **Philippe J. Weil**, this session gave all the members of the family, Founders and Next Gen, the opportunity to better understand the 'other'. Kick-started with an analysis on the impact of COVID 19 on the world of family wealth, the session also included a walkthrough of a virtual family dinner table conversation, peeking into the words and thoughts of each of the participants- the parents (Patriarch/Matriarch), the Next Gen (children and inlaws) and even the grandchildren. Following the stories/case-studies, Philippe shared some practical tools & tips that can be used to have difficult conversations, especially about wealth, with your family.

India Co-Investment Workshop

September



Sanjay Mehta



Anirudh Damani



Dr. Rebecca Gooch

This was a highly interactive workshop bringing together family principals and private investors looking to co-invest with like-minded peers. This workshop comprised interesting sessions by industry veterans and some interesting co-investment opportunities currently available. In addition to Chairing the workshop, **Sanjay Mehta**, Private Investor, **Mehta Ventures**, also presented a keynote on 'Portfolio Construction Strategy - Vision Matters, So Does The Implementation'. **Anirudh Damani**, Managing Partner, **Artha Venture Fund** presented a keynote on the equity market while **Dr. Rebecca Gooch**, Director of Research, **Campden Wealth** presented excerpts from the newly launched report- Family Offices Investing in Venture Capital, 2020

Learnings from the Patni family: Pioneers of Family Office in India

November



Amit Patni

Amit Patni is the 3rd gen member of the Patni Family- Founders of Patni Computer Systems (PCS), a family business which was instrumental in establishing the Indian IT Industry. With the family also being pioneers in establishing Single Family Office in India as early as 2000s, Amit is hailed as a veteran in the family office ecosystem. In this session he shared with his peers the family's journey towards establishing one of the first family offices in India, his first hand learnings, benefits of having a family office & its functions, SMART tips to consider when planning for a Family Office and many other FAQs on this concept.

ANNUAL FLAGSHIP FORUMS 2019

Indian Families in Business Conference April, Mumbai

Themed on 'Adapting and Adopting to a Dynamic Environment', the 2 day conference covered a wide range of topics related to family businesses. This conference was Chaired by **Ms Leena Dandekar**, Founder & CEO, Raintree Family Office, and **Mrs. Zarina Screwvala**, Founder, Swades Foundation. It also witnessed industry veterans such as **Mrs. Anu Aga**, **Thermax**, **Dr. Arokiaswamy Velumani**, **Thyrocare**, **Mrs. Rati Forbes**, **Forbes Marshall**, **Aparna Piramal Raje**, **Janak Sarda**, **Deshdoot Media**, **Suzannah Muthoot**, **Muthoot Papachan Group**, **Karan Virwani**, **Embassy Group**, **Apurva Parekh**, **Pidilite** and many more, share insightful experiences of their journey with the delegates.



Indian Family Alternative Investment Conference

August, Mumbai

Campden launched the India edition of the global Alternatives Investment Conference- the Indian Family Alternative Investment Conference in Mumbai. The inaugural edition was chaired by **Mrs. Harshbeena Zaveri**, Chairman, NRB Bearings and brought together expert knowledge and opinions on 'Alternatives' in India. The daylong conference saw topics Chief Investment Officers of large Single Family Offices- **Chaitanya Deshpande** from SharrpVentures, **Amit Mehta** from LN Bangur familyoffice, **Amitabh Chakraborty** from Khimji Family office, **Vikram Desai**, DSP Investments- share their view points on their preferred alternatives and asset allocation towards a PE/VC portfolio.

Indian Family Office Conference October, Mumbai

Themed on 'Progression of Family Offices', the 2 day conference was Chaired by **Devendra Surana** of **Surana Group**, 2nd Gen member from one of the leading legacy business families of Hyderabad, and **Abhishek Goenka**, Chief Executive Officer, **Family Office**, **RMZ Corporate**, one of the largest commercial real estate developers in India. CIOs from large Single Family Offices- **RMZ Group Family Office**, **Benett & Coleman**, **SAR Group Family Office**, **Hiranandani Family Office**- shared their respective experiences in setting-up a Family Office and asset allocation strategies.



EXCLUSIVE EVENTS 2019

Art & Luxury with Sotheby's *February, New Delhi*

Campden kick-started the year with an exclusive forum on **'Modern & Contemporary South Asian Art'**. Hosted in association with **Sotheby's**, this event aimed at apprising the audience on exploring 'Art' as an alternative investment avenue along with a walk-through of exclusive artworks by M.F Hussain, S.H. Raza and Souza, owned by Sotheby's.



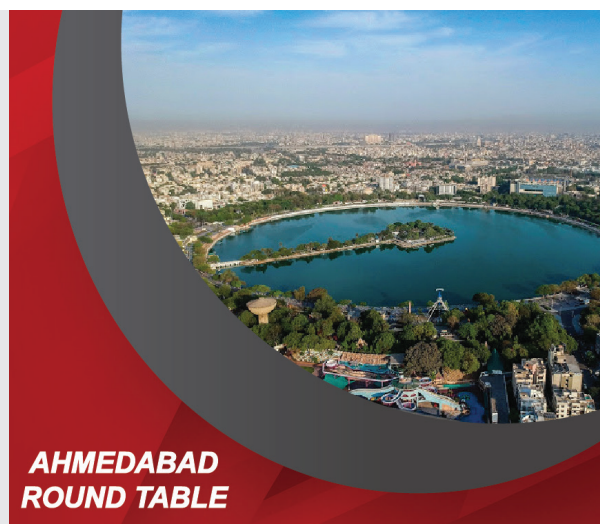
NextGen Meet *June, Mumbai*

In association with ICICI Ventures and themed on **'Bridging Gaps to be Accepted'**, the forum opened with an edifying session on **'Affordable Housing'** with **Ashok Chhajer**, **Arihant Superstructures**, **Nayan Shah**, **Mayfair Housing** and **Pradeep Rohilla**, Director Real Estate, **ICICI Venture**. **Abha Dandekar**, **Raintree Family Office**, **Akshat Saraf**, **Radha Smelters**, **Jyotsna Sanghi**, **Sanghi Brothers Pvt. Ltd.**, **Kairavi Mehta**, **V.K Industrial Corporation Ltd.** and **Shrenik Ghodawat**, **Sanjay Ghodawat Group**, discussed their respective journeys to leadership roles, challenges faced and their success stories.



Maiden Round-table in Ahmedabad *December, Ahmedabad*

Held in association with **AZB & Partners**, the **'Round-table'** program was designed to aid Families of Ahmedabad understand the basics of Family Office and also explore the start-up ecosystem as an alternative investment avenue. The half-day program started with a session on **'Will & Succession Planning'** by followed by a dialogue between veterans in the Family Office space- **Jai Rupani**, CIO, **Dinesh Hinduja Family Office**, **Amit Patni**, Director, **RAAY Global** and **Parag Desai**, Executive Director, **Wagh Bakri Tea**. **Sanjay Mehta**, **Mehta Ventures**, gave insights on investing in start-ups, right from sourcing and evaluating to structuring VC deals.



EXCLUSIVE EVENTS 2019

Co-Investment Workshops 2019

Exclusive to Campden Members, co-investment workshops are highly interactive half-day programs that bring together family principals and private investors looking to co-invest with like-minded peers. The workshop delivers exclusive case studies and co-investment best practices designed to overcome challenges while also hearing about some interesting co-investment opportunities currently available.

In 2019 Campden concluded 2 Co-investment workshops- in August and October- that were chaired by **Arihant Patni**, Managing Director, **Patni Financial Advisors** and **Jai Rupani**, CIO, **Dinesh Hinduja Family Office** respectively.



Private Member Briefings 2019

In line with Campden's endeavour to provide a secure and trusted networking platform for Families, Campden Family Connect introduced and regularly hosted exclusive private meet-and-greet gatherings for the Members. In 2019, Campden hosted 5 such exclusive briefings and gatherings in February, April, July, October and November across Mumbai and Hyderabad.

ANNUAL FLAGSHIP FORUMS 2018

Indian Families in Business Conference

April, Mumbai

Family engagements are rooted in family values & culture and nurtured through transparent communication. These traits are displayed in the family business, the family office, the board, and philanthropic activities undertaken, to name a few. Themed on **'Nurturing Family Engagement Across Generations'**, this 2 day forum highlighted on how families encourage engagements across all facets of the family. Eminent speakers such as **Lavanya Nalli, Nalli Group, Parag Desai, Wagh Bakri Tea, Shailesh Haribhakti, Haribhakti & Co, Abhishek Lodha, Lodha Group, Merrill Fernando, Dilmah Tea, M V Subbiah, Murugappa Group, Nisaba Godrej, Godrej Consumer Products, Samina Vaziralli, Cipla Limited, Rajvi Mariwala, Mariwala Health Initiative** shared stories on inclusion vs. exclusion, practical ways to foster interest in the family through education, diversification, and the family bank.



Indian Family Office Conference

December, Mumbai

With an underlying theme of **'Strategies for Prosperity & Preservation of Wealth'**, the 2 day conference was Chaired by **Suresh Chitturi, Srinivasa Farms** and covered a wide range of topics related to family offices. Speakers such as **Niranjan Hiranandani, Hiranandani Group, Zia Mody, AZB & Partners, Nitai Utkarsh, Hero Motor Corp, Sanjay Mehta, Mehta Ventures, Chris Kolenaty, Kirloskar Family** and many more discussed the investment outlook, shift in asset allocation from Patriarchs to NextGens, exploring the VC space for investments and overcoming conflicts in the family. A panel comprising women in leadership roles such as **Aditi Kothari, DSP Investments, Uma Kollareddy, Midwest Group, Aarti Gupta, DBR Ventures** discussed the growing role of women in Family offices while yet another panel of FirstGen entrepreneurs, such as **Jitendra Gupta, PayU, Miftaur Rahman, WOW! Momo and Ramakant Sharma, Livspace**, shared their strategies for growing and preserving wealth.

EXCLUSIVE EVENTS 2018

Networking over 'Wine & Cheese'

January, New Delhi

An evening of meet-&-greet over 'Wine & Cheese', held in New Delhi in January, saw high profile guests such as **Ashok Mittal**, Owner, **Lovely Professional University**, **Priya Paul**, Director, **Apeejay Surrendra Group**, **Aditya Bagri**, Director, **Baggrys India** and **Keshav Bansal**, Director, **Intex** sharing and gaining knowledge through peer-to-peer networking.



Grooming the Next Generation for Success

March, Hyderabad

The first-of-its-kind round-table in Hyderabad discussed the grooming, roles adapted, and aspirations of Next Gen family members. Chaired by **Mr. Suresh Chitturi**, Vice Chairman, **Srinivasa Hatcheries** more than 30 family members discussed on ways to choose the Right Successor so as to ensure Perpetuity.

Exclusive NextGen Meet

June, Mumbai

Hosted exclusively for the NextGen aged 21-40, this event aimed at providing a platform to them for sharing and understanding their challenges as a Next Gen Family Member.

Speakers such as **Pooja Gangwal**, Director, **Brescon Family Office**, **Vaibhav Agarwal**, Co-Founder, **Manpasand**, **Devita Saraf**, Founder and CEO, **Vu Technologies**, **Anant Goenka**, Executive Director, **Indian Express Group** deliberated on how NextGen can maintain a balance between their innovative ideas and the traditional methods set by their parents and still follow their aspirations with the support of their family members. They also discussed their own journeys and highlighted the guidance that they received from the previous generation. More than 30 NextGen members attended this event.



EXCLUSIVE EVENTS 2018

Regional Family Office Conference *August, Hyderabad*

This exclusive gathering provided a forum for discussing the Motivations and Reservations for setting up a Family Office and factors affecting the decision of Asset Allocation. Chaired by the **multifaceted personality Mrs. Kamini Saraf** – a Stylist, Entrepreneur, partner of designer store **Angasutra**, Chairperson of **FICCI FLO 2017-18**, close to 50 family members attended this conference to gain insights on family governance and leadership. Speakers such as **KR Muthukumar**, Advisor, **Manipal Education & Medical Group (MEMG)**, **KC Ganesh**, President, **Prayog Advisors**, **G Vijay Kumar**, CFO, **Kaveri Seeds** also discussed on performance of investment portfolio across asset classes.



Managing Wealth for Women in Family Business *September, Mumbai*

Attended by more than 20 women from business families, this exclusive event aimed at familiarizing women with wealth management right from briefing them about investment avenues, asset allocation to risk appetite and

Succession Planning & Governance *October, Coimbatore*

Organized in partnership with **AZB & Partners**, this round-table deliberated on the check-list, and process of Succession Planning while also elaborating on the importance of governance in Family Business. The session had more than 15 family members who came together for gaining knowledge and networking.



ANNUAL FLAGSHIP FORUMS 2017

Indian Families in Business Conference April, Mumbai

Today's leaders are challenged by the intense pressure to produce short term success. However, there are family businesses that have prospered for 100 years and more. The 2017 edition of IFIB themed on **'Long Term Prosperity: Preparing the Family Business for the future'**, was focused on learning how legacy Family Businesses were prospering and getting it more right. The conference started with **Niccolo Rossi**, Executive Chairman of **Birks Group** and the NextGen of a well distinguished **Rosssi di Montelera family**, sharing key insights into the development of a new active business within the Birks group. **Tatwamasi Dixit** moderated a remarkable session on succession planning while **Peter Leach** from **Deloitte UK** interviewed **Urvi Piramal** on her journey in the company. The conference also saw NextGens such as **Devita Saraf**, **Radha Kapoor Khanna**, **Aditi Kothari** deliberate on running business the NextGen way. **Eric Allyn**, Former Chairman, **Welch Allyn** inaugurated Day two by presenting the various challenges of exiting a Family Business and the interesting story of setting up a Family Office with a family of 58 members.



Indian Family Office Conference October, Mumbai

Themed on **'Creating the Right Family Office Structure to Manage Wealth and Sustenance'**, IFOC 2017 discussed ways to identify the right Family Office structure for protecting and preserving assets for future generation. The 2 day conference had an impressive line-up of speakers, across topics, such as **Rakesh Jhunjhunwala**, **Rati Forbes**, **Manju Lodha**, **Vidya Shah**, daughters of Rana Kapoor – **Radha Kapoor**, **Rakhee Kapoor** and **Roshni Kapoor** and many more. **Dilip Piramal** chaired a session of Young Leaders including **Anirudh Damani**, **Abhishek Lodha** and **Abhinav Reddy** on the generational transfer and wealth allocation. Key insights were also shared on Strategic Asset Allocation and Structuring the right model for Family Offices by **Anuj Puri** from **Anarock**, **Gaurav Sachdeva** (JSW Ventures) and **Rajan Navani** from **Jetline**. The conference was concluded with a highly intensive and engaging **'Co-investment Workshop'** wherein participants were given an opportunity to co-invest with other Principals.

EXCLUSIVE EVENTS 2017



Succession Planning

January, New Delhi

A healthy conversation floated across table with 10 principals discussing the induction of Next Gens and giving up the reigns while 16 Next-Gen shared their thoughts on keeping up with the family name, filling the shoes along with bringing innovation & growth. This was chaired by **Ajay Behl, AZB & Partners.**

Management v/s Ownership

February, Pune

A very engaging discussion on the role of outside leaders in Family Business was attended by 17 Family Business Principals & Next-Gens. This was chaired by **Amit Patni, Campden Family Connect.**



Setting up a Private Family Trust

June, Mumbai

With extreme curiosity in trust planning, 26 Family Principals and 6 Next-Gen participated in a remarkable workshop hosted by **Mr. Nishith Desai, Nishith Desai Associates.**

Taking Campden to Bangalore

July, Bangalore

A networking event over Wine & Cheese got positive response from the 15 families attending and exploring more about Campden's activities in India.



Creating an Entrepreneurial mind-set within your family Business

October, Chennai

An engaging conversation with audience of 25 Family Business principals and Next-Gens participating, sharing their thoughts and ideas on the topic. This gathering was chaired by **Lavanya Nalli, Nalli Saris.**

KNOWLEDGE FORUMS 2016

CFC Launch Event

April, Mumbai

CFC organized a launch event in April, 2016 to mark the beginning of India operations for Campden. **Rohit Chandaria, Comcraft Asia Pacific, & Vijay Mansukhani, Onida**, graced the event by sharing their experiences & thoughts on Family Legacy and Succession. **Dominic Samuelson, CEO, Campden Wealth, & Amit Patni, Director, Campden Family Connect** addressed the elite group of over 60 ultra-high net worth Indian families at Mumbai's Taj Mahal Palace Hotel to give them a glimpse of Campden's worldwide activities and enlighten them regarding preservation of their wealth for the coming years.



Indian Families in Business Conference

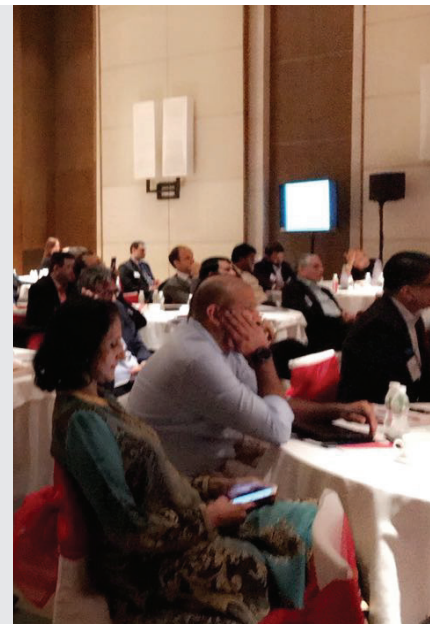
September, Mumbai

Campden's inaugural Indian Families in Business Conference witnessed participation from industries' top business Family members. Themed on **'The changing face of Indian Family Business'**, the 2 day conference had eminent business Family members gather & discuss succession planning, preservation of family wealth and encouraging entrepreneurship in Family business. The audience gained insights from founder & chairman of **Apollo Hospital, Pratap C Reddy**, his daughter **Shobana Kamineni** & his grandchildren, the Kanoria family patriarch- **H P Kanoria** and other renowned business Family members, namely **Priyadarshini Kanodia, Datamatics, Suchita Oswal Jain, Vardhaman Textiles, Arun Chittilapilly, Wonderla, Ayesha Mansukhani, Adino Telecom** who shared their experiences on running their legacy family businesses at this forum.

Indian Family Office Conference

November, Mumbai

Campden wrapped its maiden year with the first edition of Indian Family Office Conference. Themed **'From Family Business to Family Office: Securing the family future and legacy'**, the 2 day conference had experts give insights on classical structures of Family office governance. While **Galahad Clark, Vivobarefoot**, educated the audience on the transition of Family Business to Family office, journey to discover a Family office was detailed out by the Trivedi Family office principals-**Ashok & Shivani Trivedi**. The conference also witnessed **Zia Mody, AZB & Partners, Harshbeena Zaveri, NRB Bearings and Juzar Khorakiwala, Wockhardt**, deliberate on the benefits of building a portfolio. The Marico Chairman, **Harsh Mariwala** briefed the audience on professionalising the family business and **Shloka Mehta, Rosy Blue, Sonakshi Agarwal, Sterlite Industries, and Zarina Screwvala, Swades Foundation** shared some key experiences on resource allocation for strategic philanthropic initiatives of businesses, family foundations and family offices.



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.



Membership | Events | Research | Education | IPI

A Patni Family & Campden alliance

**EXCLUSIVE NETWORK OF
WORLD'S LEADING FAMILIES**