

Adding  
me  
family  
les

ADDING VALUE  
TO FAMILY VALUES

*Adding  
value  
to family  
values*

## WHY

### THE ROLE OF A FAMILY OFFICER



In today's Italian business families, values, relationships and wealth merge in a highly complicated manner. Even more so, when the total family wealth is diversified through a wide array of asset classes: stakes in the family business, stocks; bonds; alternative investments; real estate; fine arts and collections.

Diversification and *complexity* can hinder a proper monitoring and control over these elements.

A *comprehensive view* of family wealth and business is more and more needed.

## BEING

### A FAMILY OFFICER



A family officer is a professional willing to establish a solid and confidential relationship with business families in order to help them manage and reduce such *complexity*.



A Family Officer's professional drive can grow out of different backgrounds: Finance, Tax Planning, Business Administration; Family Law; Mentoring and Coaching.

#### *A F.O.'s Professional Achievement*

- a systematic, comprehensive and tailor-made approach
- a Rigorous Business Ethics
- a strong and independent identity
- leadership in multi-disciplinary projects, involving other skilled professionals
- a careful focus on international financial issues and business practices

## AIFO. THE F.O.'S ASSOCIATION

■■■ AIFO is a not-for-profit network founded in 2006 by Patrizia Misciattelli delle Ripe to better achieve her long-standing professional commitment of conveying the culture of Family Office to Italian business families.

AIFO intends to promote and support the professional figure of the Financial Family Officer.

## AIFO. THE MISSION

■■■ AIFO's Mission is to act as a *meeting point* between its Members and Partner Companies from all over the world - and a Social & Economic Background made of UHNWI's and SME's Business Owners from industrial clusters across Italy.



## AIFO. PROVIDING DEDICATED SERVICES TO:

# senior members

■■■

- Single Family Offices
- Multi Family Offices
- Chartered Accountants
- Consultancies
- Lawyers
- Tax Advisors
- Independent Financial Advisors
- Private Bankers
- CFO's

# junior members

■■■

- Young Entrepreneurs
- Junior Professionals
- Post-Graduate with strong motivations and connections

# partner

■■■

- Investment Firms
- Private Banks
- Insurance Companies
- Private Equity Funds and Advisors
- Alternative Investment Funds and Advisors
- Research Centers

## THE BENEFITS FROM BECOMING A MEMBER

### DEDICATED ANSWERS

- ■ ■ **One-to-one meetings.** AIFO plays an intermediary role between Members and Partners, with the aim of providing its Members with a direct link to the world's top financial players.

**AIFO's Library.** AIFO's Members have a constant update on the most important topics and hottest issues, as well as the possibility to access the materials presented in all AIFO's seminars and Financial Apertifs.

**AIFO's Research Desk.** All Members can interact with the Research Desk for dedicated advice on all the issues and areas covered by a Family Officer.

**Financial Aperitif.** The Members are invited to special cocktail seminars on a monthly basis, where AIFO's Partners present their views on a discussion panel, interact with audience and have the chance to make new connections.

### A DEDICATED MASTER

- ■ ■ AIFO holds an Executive Master in Family Office Management . It is designed to provide the participants with the advanced know-how and methodology needed to take on the responsibility of a family officer.
  - a specific course is designed for those willing to add this new role to an existing career.
  - a broader course is designed for those at the beginning of their professional life

### A DEDICATED MASTER

- ■ ■ AIFO's Members are granted with privileged access to a selection of software enabling them to perform a number of crucial services in the most effective way:
  - Integrated Family Wealth Reporting
  - Financial Planning
  - Hedge Fund Selection
  - Art Advisory and Valuation

### NETWORKING, VISIBILITY, AND KNOW-HOW

- ■ ■ **Speaking at AIFO's Seminars.** AIFO provides its Senior Members with the possibility to join AIFO's Partners on the discussion panel of its seminars and other events, organized through several international Family Office Networks .

**AIFO's Newsletter.** AIFO's Members are encouraged to intervene with articles and technical notes on AIFO's Newsletter, thus sharing their views with other Members and a broader public as well as benefiting from a wider visibility. AIFO's Newsletter is sent to a targeted database of a few thousands of contacts.

**AIFO's Online Social Area.** AIFO's Members can also interact through the reserved area of AIFO's website, for questions, references, and professional networking and job placement.

**Networking.** This service is for Members who want to make contacts with other Members or attendees to AIFO's events. AIFO will take care of the approach and will organize meetings on a one-to-one basis or host round-table talks to focus on special issues.

### OTHER BENEFITS

- ■ ■ **ESAFON - The European Family Office & Strategic Advisors Network:** possibility to participate to annual F.O.'s conferences with a 50% discount.

**The Magazine "Family Office":** possibility to have a 50% discount on the annual subscription.

## AIFO' PARTNERS

### ■ ■ ■ *The world's leading financial players:*

- Investment Firms
- Private Banks
- Insurance Companies
- Private Equity Funds and Advisors
- Alternative Investment Funds and Advisors
- Research Centers

### ■ ■ ■ *AIFO's commitment to the Partners is to help them establish a preferential dialogue with its Members and its contact network, so that:*

- Partner Companies have the chance to share their views and business proposals with a qualified audience.
- AIFO's Members and the wider network of business families and HNWI's around them can benefit from a close contact with the Partners.
- New contacts and business relationships can be built and strengthened.

## THE BENEFITS FROM BECOMING A PARTNER

### ■ ■ ■ *AIFO & Partners. Together in special seminars: The Financial Aperitifs*

In the last years, AIFO has built a solid reputation in organizing and managing high standard events for its Partners, always at the forefront of the world's financial industry debate. All events take place in top quality facilities and follow the proven and well known format of the "Financial Aperitif", consisting of an open conference followed by an informal cocktail. All events can be tailor-made upon the needs of the Partners.

AIFO takes care of the whole process of the event creation and management:

- Defining the event idea and the most important topics to be discussed
- Inviting AIFO Members and a selection of other guests
- Organizing a discussion panel
- Introducing the topics calling upon independent panelists
- Providing its Partner with visibility on its newsletter and website
- Contacting and distributing the presentations to all AIFO Members
- Collecting individual and detail feedback from participants
- Taking care of the event logistics

### ■ ■ ■ *AIFO & Partners. One-to-one meetings with AIFO Members*

One-to-one meetings and work groups are designed as a moment where Partners and Members can get into a closer relation and have a more focused approach on the issues of interest.

One-to-one meetings are pre-arranged and managed by AIFO itself, as part of its commitment to help share ideas and build new relationships.



### *AIFO & Partners: Speaking in institutional events and conferences*

AIFO is interested in sharing with its Partners the possibility to take an active role in both national and international events, enhancing its visibility through interested and competent audiences – e.g. Esafon and other international family offices networks.

*AIFO, in an effort to constantly provide up-to-date information and interact with its Members, is very keen to share with its Partners all its communication channels:*



*AIFO Newsletter*, where Partners and Members can contribute with specialized articles and reach a large number (in the thousands) of selected contacts, on a monthly basis.



*AIFO Social*, a virtual place where both Members and Partners can interact with Q&A's and discussion; share their professional interests and profiles; and contact AIFO for one-to-one meetings demands.



*AIFO Recruiting*, where AIFO's Partners and Members can access a database of professional profiles, as well as request interns from the “Master in Family Office & Wealth Management”, regularly organized by AIFO.