

*The 6th Annual Conference*  
**Italian Family Wealth Management**  
September 29 & 30, 2009  
Switzerland

**First Day**

**September 29, 2009**

**KEY CONSIDERATIONS TO THE MANAGEMENT OF FAMILY FINANCIAL ASSETS IN 2009-2010**

**08.30 am Welcome Coffee and Registration**

**09.00 am Welcome Opening Remarks by François Golbery and the Chairman**

**Francesco Aletti Montano**

Chairman

ALETTI MONTANO & CO FAMILY OFFICE SARL, Milan

**09.15 am The Global Macro-Economic Outlook - The world in 2010**

- How to protect your wealth - a focus on hard assets versus equities and fixed income
- Will the greater threat be inflation or deflation?
- Socio-Economic problems arising out of greater protectionism
- A country focus - optimising investment opportunities between Europe, the US and Asia

**Philippe Manduca**

Head of Investment

THE ECU GROUP PLC, London

**09.45 am Is It a Good Time to Buy Stocks?**

**Robert Q. Wyckoff**

Managing Director

TWEEDY BROWN, New York

*Hedge Funds – Private Equity*

**10.15 am Take Advantage of the Hedge Fund Experience in the UCITS Industry**

**Massimo MAZZINI**

Chief Executive Officer

EURIZON AI, Milan

**10.45 am Lessons Learnt from the Financial Crisis & The Perspective of Stock Markets vs Alternative Assets (especially PE and Absolute Return funds)**

**David A. Fisher**

Chairman

INNOVA CAPITAL, Adventura, Florida

**11.15 am Coffee Break**

**11.45 am The Evolution of the Investments in Hedge Funds done by Italian Family Offices**

**Stefano Gaspari**  
Chief Executive Officer  
MONDOHEDGE, Milan

**12.15 pm Where is the Value Added in Adding Hedge Funds in a Family Office Portfolio?**

**Laurent Favre**  
Partner  
ALTERNATIVESOFT, London

*Real Estate*

**12.45 pm Market Outlook for Real Estate Investment**

**Dr. Thomas Beyerele**  
Head of Research  
DEGI, Frankfurt

**01.15 pm Lunch hosted by DEGI & ABERDEEN**

**02.45 pm The Swiss Real Estate Market - Structuring Opportunities and Strategic Allocation**

**Martin Vogel**  
Attorney - at - law & Independent Director,  
Luxembourg

**PRIVATE EQUITY AND BUSINESS SUCCESSION - EVIDENCE FROM ITALIAN SME'S**

**03.15 pm The Italian SME Family Owned Businesses - Succession Problems and Opportunities**

**Massimo Girardi**  
Managing Partner  
DGPA SGR s.p.a., Milan

**03.45 pm Private Equity & Business Succession in the Winery Industry: Is Wine a Safe Heaven Asset Recession - Resistant?**

**Stephen Kuhn**  
Managing Partner  
VINUM CAPITAL MANAGEMENT LLC, San Anselmo

**04.15 pm Coffee Break**

**04.45 pm      Planning Italian Family Business Succession through Trust**

**Paolo Panico**  
Founding Partner  
PRIVATE TRUSTEES SA, Geneva

**05.15 pm      The Value of the "Made in Italy" Brand**

**Dr. Eduardo Schindler**  
Founder & CEO  
2ThePoint AG, Zurich

**06.00 pm      Closing Remarks of the Chairman**

**06.15 pm      Close of the first day**

**06.30 pm      Cocktail hosted by ESAFON**

**Second Day**

**RETHINKING TAX & ESTATE PLANNING**

**08.30 am Welcome Coffee and Registration**

**09.15 am Welcome Opening Remarks by François Golbery and the Chairman**

**Patrizia Misciattelli**

Presidente

AIFO (Associazione Italiana Family Officer), Milan

**09.30 am Achieving Global Protection and Privacy: Family Office / Tax Planning / Cross-Border Issues**

**Paula Coates**

Associate Director

ABACUS, Isle of Man

**10.15 am How to Successfully Blend Family and Business Interests in a Cross-Border Environment**

**Mag. Erich Baier, LL.M**

Certified Public Tax Adviser

BILANZ DATA GmbH, Vienna

**11.00 am Coffee Break**

**ENHANCING COMMUNICATION AMONGST FAMILY MEMBERS**

**11.30 am Family Case-Study: Enabling & Enhancing Communication Amongst Family Members**

**Panelists:**

**Edouard Thijssen**

Family Member of the Emsens Family

Co-founder YOUNITED SA, Belgium

**Edouard Janssen**

Family Member of the Solvay Family

Co-founder YOUNITED SA, Belgium

**12.15 pm Closing Remarks of the Chairman**

**12.30 pm Close of the Conference**

**To register,  
Please fax or e-mail back this Application Form fulfilled and signed to our Customer Service  
Fax: + 41 22 319 69 01 or 011 41 22 319 69 01 from the USA  
e-mail: [customer.service@mgi-direct.ch](mailto:customer.service@mgi-direct.ch)**

*The 6th Annual Conference*  
**Italian Family Wealth Management**  
September 29 & 30, 2009  
Switzerland

**REGISTRATION FORM**

CONFERENCE:

Title: **Italian Family Wealth Management**  
Location: **Royal Splendide- Switzerland**

Date: **September 29 & 30, 2009**  
Conference Code : **C0912**

REGISTRATION:

Name: ..... First Name: .....  
Position: .....  
Company: .....  
Address: .....  
Email: .....  
Tel: ..... Fax: .....

**Yes, I wish to register to The 6th Annual Conference Italian Family Wealth Management (C0912) for the price of: CHF 3'350 (+ VAT 7.6%)**

- The fee for the conference includes refreshments, luncheon, cocktail and a CD-ROM of the presentations
- A 30% discount "MGI Member" is granted for the participants of our Family Office for Italian Families conference in 2007
- A 40% discount is granted for the second and any additional registration from the same institution at the same address
- A 50% discount is granted to **Family Member, Family-Owned Business, Private Investor, Limited Partner or Single Family Office** (please tick your profile)
- A 60% discount is granted to **ESAFON Member, AIFO Member** (please tick your profile)

**Please send the invoice to the following address:**

.....  
.....  
.....

**Date:** .....

**Signature:** .....

*(Please notice the discounts are not cumulative with other discounts)*

### **DATI BANCARI**

From Europe:

- Payment in CHF :

Bank : Credit Suisse - CP100 - CH Zürich  
IBAN : CH72 0483 5036 2955 4100 0  
SWIFT : CRESCHZZ12A  
Account n° : 0251 - 362955 - 41

- Payment in Euros :

Bank : Banque de Luxembourg, 55, Rue des Scillas, L 12529  
Howald Luxembourg  
IBAN : LU35 0080 9452 7700 1003  
SWIFT : BLUXLULL - Account n° : 0945277/001.003

### **CANCELLATION POLICY**

Cancellation up to one month by writing before the conference will support an administrative charge of 10% of the fee. Prior to the one month the full fee is due but a substitute delegate may attend in your place if required.

### **MGI COMMITMENT**

This programme has been specially designed in compliance with the quality criteria set by MGI. The topics covered are issued from our research and the panel of speakers has been carefully selected on the basis of their credentials and relevant experience. Therefore, this programme is the sole property.