

## FAMILY BUSINESS & FAMILY OFFICE

### The 4<sup>th</sup> Annual Italian Family Office Conference

March 29 & 30, 2006  
Hotel Principe Di Savoia - Milan

*organized by:*

*In Partnership With:*





Dear Executive,

This year conference will start with a state of the art report on family business and family office management in Italy and move on to address the complexities in this area including the GOVERNANCE issues linked with the Italian corporate law reform and its implications for family members as executive directors.

Then the conference will touch on the inter-relationship between family businesses and family offices with the Italian banking system and how to manage the relationship as well as the information system.

Tax is also an area of concern as legislation in any country is deemed to be modified around general elections and the conference will highlight legitimate capital preservation schemes and tax minimization instruments available.

Smart investing is also high on the priority list of sophisticated investors; this includes private equity, alternative assets and fast growing markets such as China and India.

Private equity is about investing in entrepreneurs and therefore the asset class of choice of many entrepreneurial families such as the Harald Quandt Family amongst others.

The conference will also address the rational to invest in India and China, two countries set to be the drivers of global growth but with different patterns.

Finally, a non-biased view of alternative assets will be detailed by both academics and professionals.

This conference, once again, is set to deliver highly valuable strategic information and is an outstanding opportunity for networking and exchange of thoughtful ideas.

We look forward to welcome you next March 29 & 30, 2006.

Yours Sincerely,

François Golbery  
Chief Executive Officer  
MGI SWITZERLAND S.A.

Guido Corbetta  
Professor  
SDA BOCCONI

Stefano Caselli  
Professor  
SDA BOCCONI

**First Day**

**March 29, 2006**

- 8.30 **Welcome Coffee and Registration to the 4<sup>th</sup> Annual Italian Family Business and Family Office**
- 9.00 **Opening Remarks by Guido Corbetta, Stefano Caselli and François Golbery**

**Part One: The State of the Art Coming from Research**

- 9.15 **Family Business and Family Office: What's going on within the Italian market?**

**Guido Corbetta**  
Professor  
SDA BOCCONI, Milan

- 10.15 **How do Family Offices Work? What are their Mission and Framework? A survey sampling US and European based family offices**

**Dr. Gero M. Bauknecht**  
Executive Board Member  
BEEKAY FAMILY OFFICE AG, Zurich

- 11.00 **Coffee break**

**Part Two: Managing Complexities in the Family Business – Family Office Areas**

- 11.30 **Duties and Responsibilities of Family Members as Executive Directors  
A Comparison of Corporate Governance Models**

**Pietro Sella (to be confirmed)**  
AIDAF

- 12.15 **Lunch**

**Part Three: Strategies- Information System to Manage the Inter-relation between Family Offices & Banks**

- 14.00 **Banking System and Family Office: A puzzle to manage?**

**Stefano Caselli**  
Professor  
SDA BOCCONI, Milan

- 14.30 **Round-table: Inter-relationship Challenges amongst Family Businesses, Family Offices and Banking Systems**

**Moderator: Stefano Caselli**

**Panellists: Stefano Gatti**  
Professor  
SDA BOCCONI

**Paola Musile Tanzi**  
Professor  
UNIVERSITY OF PERUGIA

**Fausto Bolognini**  
Marketing Director  
BANCA INTESA

**Paola Pietri**  
Managing Director, UBM  
UNICREDIT GROUP

**Gino Gandolfi**  
Professor  
UNIVERSITY OF PARMA

**Christian Sulger Buel**  
Managing Director  
SULGER BUEL & COMPANY  
EXECUTIVE SEARCH IN  
WEALTH MANAGEMENT, London

16.00 **Coffee break**

**Part Four: Protecting Assets and Generational Issues**

16.15 **The Use of Trusts by International Families and the Connections to US Taxation**

**Jeffrey A Galant**  
Partner  
LABATON SUCHAROV & RUDOFF LLP,  
New York

17.00 **The Use of Purpose Trust, Family Trust and Private Foundations in Italy**

**Paolo Panico**  
Adjunct Professor  
UNIVERSITY OF MODENA

17.45 **The Specific Asset Protection Advantage of a Liechtenstein Life Insurance Policy for an Italian Investor**

**Dr. David F. Moser**  
Director Italy  
CAPITAL LEBEN, Liechtenstein

**Walter Limongi**  
Attorney At Law  
LIMONGI & RAVONE STUDIO LEGALE  
ASSOCIATO, Milan

**Fabio Ravone**  
Attorney At Law  
LIMONGI & RAVONE STUDIO LEGALE  
ASSOCIATO, Milan

18.30 **Closing Remarks by the Chairman**

18.45 **Cocktail**

**Second Day      March 30, 2006**

8.30 **Welcome Coffee and Registration**

9.00 **Opening Remarks by the Chairman**

**Stefano Caselli**  
Professor  
SDA BOCCONI

**Part Five: Investing in the Future**

9.15 **The Rational to Invest in China and India**

**CHINA**  
**Maria Weber**  
Professor  
SDA BOCCONI

**INDIA**  
**Tom Clausen**  
Managing Partner  
CAPVENT AG, Switzerland and India

**Rahul Sud**  
Founding Partner  
SILICON CAPITAL, New Dehli

10.00 **Ensuring Diversification and Access to the Global Buyout Market**

**Jonathan Polin**  
Deputy CEO  
BRITANNIC ASSET MANAGEMENT, London

**Stefan Wilhelmson**  
Managing Director  
AUDA, London

11.00 **Coffee break**

**Part Six. Investing in other Alternative Assets**

11.15 **Investing in Commodities**

**Barbara Alemanni**  
Professor  
UNIVERSITY OF GENOA

11.45 **Opportunities in Hedge Funds**

**Marco Navone**  
Professor  
SDA BOCCONI

12.15 **Investing in Real Estate**

**Armando Borghi**  
Professor  
SDA BOCCONI

**Ezio Bruna**  
Managing Partner  
PROPERTY CAPITAL, Milan

12.45 **Closing Remarks**

# FAMILY BUSINESS & FAMILY OFFICE

## March 29 & 30, 2006 – Hotel Principe Di Savoia - Milan

### How to Register

- By Phone : 41 22 319 69 00
- By Fax to : 41 22 319 69 01 or 011 41 22 319 69 01 from the USA
- By Mail : MGI (SUISSE) SA  
56, rue du Stand - CH-1204 Genève - Suisse
- By E-mail : customer.service@mgi-direct.ch
- By Internet : www.mgi-direct.ch

### Date and Venue

#### Conference - March 29 & 30, 2006 (C0612)

Hotel Principe Di Savoia – Piazza della Repubblica - Milan

### Program Coordinators

Stefano Caselli - stefano.caselli@uni-bocconi.it  
Guido Corbetta - guido.corbetta@uni-bocconi.it  
François Golbery - fgolbery@mgi-direct.ch

### Accommodation

MGI has negotiated preferential rates with a number of hotels close to the conference. Please call our Registration Desk on 41 22 319 69 00 for further details.

### Fee

**THE FEE FOR THE CONFERENCE INCLUDES REFRESHMENTS, LUNCH, COCKTAIL AND A CD-ROM OF THE PRESENTATIONS**

- A **15% DISCOUNT** (NOT CUMULATIVE WITH OTHER DISCOUNTS) IS GRANTED FOR ANY EARLY REGISTRATION AND PAYMENT BEFORE **JANUARY 31 2006**

- A **DISCOUNT OF 30%** IS GRANTED TO THE SECOND AND ANY ADDITIONAL REGISTRATION FROM THE SAME INSTITUTION  
- *Family members and Single Family Offices:*  
**US\$ 1'250; Euros 990; £ 690; CHF 1'500**

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### Payment

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Account in Euro n° 5004-32-71

SWIFT BCVLCH 2L - SIC 767

Luxembourg : Banque de Luxembourg

55 rue des Scillas - 12529 Howald

SWIFT BLUXLULL - Account n° 0945277001.003

Belgium : Fortis Bank

Montagne du Parc 3, 100 Bruxelles

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### 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 and SDA Bocconi. 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 of MGI SA and SDA Bocconi and cannot be copied under any circumstances.

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- Yes, I wish to attend the above MGI conference (C0612) for the price of : US\$ 2'750 ; Euros: 2'250 ; £: 1'560 ; CHF 3'450**
- Yes, I wish to receive more information about ESAFON**

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Date : ..... Signature : .....

MGI cannot be held responsible for any alteration to the program but will take all necessary measures to ensure the highest quality content.



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