

Growing successful enterprises
for generations to come

Investment Strategy Forum 4th Annual Roundtable

Diversification – a Panacea in Troubled Times?

Tuesday 7th October 2008

Institute for Family Business

32 Buckingham Palace Road

London SW1W 0RE

Tel **020 7630 6250**

Fax **020 7630 6251**

www.ifb.org.uk

With the generous support of
Withers LLP and Northern Trust

Invitation

You are cordially invited to attend the Investment Strategy Forum 4th Annual Roundtable.

This is an invitation only event for IFB members and guests. The Forum will provide an excellent opportunity to meet and exchange best practice with other families and explore new ideas and strategies.

Programme Overview

Focusing on the critical issues, you will have the opportunity to discuss managing risk and asset allocation in the family office during times of market turbulence and whether over-diversification is impacting returns. The key themes for debate include:

- Building a better understanding of investment products and demystifying alternative assets
- Developing your investment portfolio and asset allocation strategy
- Establishing appropriate investment structures and governance for families and their family offices.

Keynote Speakers:

Dr Robert Kosowski – Head of the Centre for Hedge Fund Research and lecturer at Tanaka Business School, Imperial College, London

Jim Shea – Investment Director, Innotech Advisers Limited, a single family, multi-asset class investment vehicle based in the UK

Gavyn Davies – Chairman, Fulcrum Asset Management, former Chairman of the BBC and former Partner at Goldman Sachs.

RSVP

To ensure maximum benefit for each delegate, places are strictly limited. If you would like to attend please complete and return the enclosed reply card. Alternatively, please email melissa.mays@ifb.org.uk or telephone 020 7630 6250.

The IFB employs the **Chatham House Rule**: Participants are free to use the information received at the meeting, but neither the identity nor the affiliation of the speaker(s), nor that of any participant, may be revealed.



Programme Schedule

Tuesday 7th October 2008

Venue: Swissôtel The Howard, Temple Place, London WC2R 2PR

Chairman: Paddy Walker – Director, J. Leon & Co

14:00 Registration

14:30 Chairman's Opening Address:

Diversification – a Panacea in Troubled Times?

Keynote Speakers:

Dr Robert Kosowski: New insights into hedge fund selection and alternative assets

Jim Shea: Diversification and running a multi-manager portfolio during times of turbulence

15:45 Break

16:00 Workshops and Discussion

Guided by expert moderators. Choice of two workshops:

Workshop 1: Developing an Asset Allocation Strategy

Clarifying investment aims and evaluating your risk profile. Ensuring that your strategy is implemented effectively and that there are appropriate governance and monitoring processes.

Workshop 2: Demystifying Alternative Assets

Linking the investment allocation to alternative assets to your overall portfolio strategy; selection process for alternatives to exploit the plethora of vehicles. This workshop will feature a case study.

17:15 Summary and Panel Discussion

Panelists will include:

Rosalyn Breedy – Counsel, Withers LLP

Lombard Olivier – Head of International Research, Northern Trust

18:15 Break & Drinks

18:30 Networking Dinner

Keynote Speaker:

Gavyn Davies: The state of the global economic and investment environment.

21:00 Close