Family Office Exchange

Global Family Enterprise Council

19-20 September 2023
Bologna, Italy

Proprietary and Confidential

GFC Bologna - DAY 1 & 2 September 19 & 20, 2023
Starting time: 9AM CEST/UTC/GMT+2

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FOX Global Family Enterprise Council
Virtual Agenda 2023

"Delivering the Full Potential of Family Capital"

MEETING LOCATION
Fondazione MAST
Via Speranza, 42, 40133
Bologna BO, Italy
www.mast.org

All times listed are Central European Summer Time

Business Casual Attire for Meeting

Tuesday, 19th September 2023

9:00 – 10:15 **Welcome, Goals of the GFC and Participant Updates and Introductions.**

Miguel López de Silanes, Market Leader International and Peter Moustakerski, CEO, FOX

We will hear updates from participants on their enterprise families as well as introductions from guests. We will also hear updates from FOX CEO Peter Moustakerski.

10:15 – 11:15 **Discussion on Wealth 3.0 and its Impact in Human Capital**

Led by Peter Moustakerski, FOX

Peter Moustakerski will lead a discussion about the implications of Wealth 3.0 trend, focusing on the renewed focus on the family´s purpose and wellbeing, as well as the fundamental shift from focus on financial capital to human and spiritual capital.

Tuesday, 19th September 2023 (continued)

11:15 – 12:30	**Philanthropy in the Context of Innovative Wealth Management Strategies** *Volker Then; Executive Director, Fondazione AIS and Laura Dale-Harris, CEO of the Global Treehouse Foundation, London* At MAIS we consider philanthropy an investment, even a specific asset class. Consequently, the contributions to philanthropy must be viewed from a wholistic strategy point of view. They are targeted to generate the best possible societal returns, the best possible impact in society. At the same time the payouts enabling them must be balanced against the other investment needs of the wealth.
12:30 – 13:30	***Lunch Break***
13:30 – 15:00	**Case Studies on How Families are Deploying the Full Potential of Family Capital** 2 Council participants will share updates on some of the initiatives they have been working on within the theme of "Delivering the full potential of family capital", including Philanthropy and impact and Governance and Diversification efforts. **Case on "Structuring an Enterprise Family´s Energy Company Transition and Alignment with Social and Environmental Values"** *Giovanni Moratti, Moratti family, Sustainability specialist in charge of the Energy transition department of the family company, Saras* **Update on MerweOord's Enterprise Governance and Diversification Efforts** *Paul Verheul, Executive Director/ various supervisory board roles & Yvette Van der Kloet, Managing Board Member, MerweOord B.V.*
15:00 – 15:15	***Break***

Tuesday, 19th September 2023 (continued)

15:15 – 16:45 **The Future of Private Equity Investing**

Facilitated Miguel López de Silanes, FOX

Over the last years, one thing the investment world has agreed on is that the current paradigm of Private Equity needs to radically evolve. This module will focus on the evolution of Private Equity, featuring 3-4 case studies of how some Family Offices, Investment platforms, and Private Equity funds are evolving in terms of holding periods, value addition, structures used, fee models and compensation schemes. We will also share during this model the latest info on the topic from our recent research and surveys.

Participating Guests
Rajaa Mekouar, Direct Investments Advisor, Imocobel, Luxembourg; Nicolas Petitjean, Managing Director - Private Equity Integrated Investments, Partners Group, Italy; Raniero Proietti, Managing Director. Client Solutions, Head of Southern Europe, France & Israel at Partners Group, Italy; Frederic Zwahlen, Client Solutions Spain, Partners Group; Phil Collins, CEO, Orchard Holdings Group (Investment platform helping private and family investors with direct investments), USA

17:00 ***End of sessions Day 1***

Wednesday, 20th September 2023

9:00 –10:15	**Discussion on Generational Stages in Family Enterprises and their Supporting Governance Structures** *Sara Hamilton, Founder and Chair Board, FOX* Sara will identify the evolutionary stages of a family enterprise and share examples of the four stages. She will identify the supporting governance structures for each stage and discuss how governance can help families be more cohesive across generations.
10:15 – 10:30	***Break***
10:30 – 12:00	**Panel on NextGen Engagement Plans and Involvement in the Enterprise Family with NextGen members and experts, and Peer Dialogue** *Facilitated by Miguel López de Silanes, FOX with 2-3 Next Gen Members / advisors focused on Next Gen topics* The session will focus on some key trends on next gen engagement and involvement in the enterprise family including the family businesses. **Lessons Learned on NextGen Education and Mentoring Programs** *Amber Slattery, Director at St Etrephine Private Office, France.* **Purpose is relational because Power is** *Meg Pagani, Advisor PFC Family Office, Italy*
12:00 – 12:45	**Key takeaways from GFC and wrap-up**
12:45	***End of sessions Day 2***

Global Family Enterprise Council Attendees

Jose Ignacio Ysasi Ysasmendi
Casa Grande de Cartagena
Spain

Wouter Lunshof
Eligius B.V.
Netherlands

Mary Mullens
Family Capital Corporation
Canada

Rob McDonald
Family Capital Corporation
Canada

Sherry Brydson
Family Capital Corporation
Canada

Louis De Clercq
Imocobel FO
Belgium

Rajaa Mekouar
Imocobel FO
Luxembourg

Francesca Calvaresi
MAIS Holding
Italy

Volker Then
MAIS Holding
Italy

Maurizio Petta
MAIS Holding
Italy

Paul Verheul
MerweOord
Netherlands

Yvette van der Kloet
MerweOord
Netherlands

Francesco D'Amico
Philos & Partners
Italy

Markus Stadlmann
Philos & Partners
Liechtenstein

Giovanni Moratti
Saras
Italy

James Hickman
Sovereign Man
USA

Amber Slattery
St Etrephine FO
USA

Joana Marinova
Tsotsorkov FO
Bulgaria

Michelle Jezycki
Tsotsorkov FO
USA

Maarten De Groot
VU University
Netherlands

Global Family Enterprise Virtual Attendees

Pierre Morrissette
Pelmorex
Canada

Global Family Enterprise Members Unable to Attend

David Binet
Woodbridge
Canada

Manuel Estrelles
Grupo Corporativo Landon
Spain

Session Speakers

(Listed in session/speaking order)

Peter Moustakerski
CEO
FOX

Miguel Lopez de Silanes
Market Leader International
FOX

Volker Then
CEO & Founder Executive Board
Fondazione AIS

Laura Dale-Harris
CEO
Global Treehouse Foundation

Giovanni Moratti
Director
Saras

Paul Verheul
Executive Director
MerweOord

Yvette van der Kloet
Deputy Director
MerweOord

Rajaa Mekouar
Direct Inv. Advisor
Imocobel FO

Session Speakers

(Listed in session/speaking order)
(Continued)

Nicolas Petitjean
Managing Director
P.E. Integrated Investments
Partners Group

Raniero Proietti
Managing Director
Head of Southern Europe,
France & Israel
Partners Group

Frederic Zwahlen
Client Solutions Europe
Partners Group

Phil Collins
CEO
Orchard Holdings Group

Sara Hamilton
Founder & Board Chair
FOX

Amber Slattery
Director
St Etrephine Private Office

Meg Pagani
Advisor
PFC Family Office

FOX Team

Sara Hamilton
Founder and Board Chair

Peter Moustakerski
CEO

Miguel Lopez de Silanes
Market Leader International

Ana Yaques
Associate, International
Program Manager

Maribel Rice
Executive Team
Assistant & GFC
Onsite Coordinator

FOX Team Bios

Peter Moustakerski, CEO, FOX

Peter Moustakerski is CEO of Family Office Exchange (FOX), the premier resource for families managing private enterprises and family wealth across generations. For over 30 years, FOX has been recognized as the industry's most exclusive, innovative, and influential community for peer networking and learning, and has provided independent insights, expert guidance, and practical solutions to complex problems related to family transitions and family wealth.

Peter has spent more than 25 years as a C-level strategist and executive across a variety of industries, including wealth management, capital markets, and technology. He is a former family office executive and FOX member, management consultant, and entrepreneur. He has served as a strategy, innovation, and growth leader for a number of private and public companies and founded two start-ups in New York City and China.

Prior to joining FOX, Peter served as Chief Operating Officer of the family office of the founder of Bridgewater Associates, where he worked closely with the principal family members to envision and oversee the redesign of the family office strategy and day- to-day operations to better serve the evolving needs of the family. Before that, Peter was a management consultant at Booz Allen Hamilton, advising many of the world's top C-suite leaders, and a strategy executive at UBS, leading all growth and transformation initiatives for the bank's wealth management organization.

Most recently, Peter was Chief Strategy Officer of News America Marketing, a former News Corp. subsidiary, where he built and led the Corporate Strategy and M&A function and led the company's successful carve-out and sale to a private equity sponsor. In addition, for more than 20 years, Peter has been a contributing writer and researcher with The Economist Intelligence Unit (EIU), and has led many qualitative and quantitative research projects, and written a number of influential white papers for the EIU, NBER, and other research institutions and media publications.

Peter holds an MBA from Columbia Business School and a BSc in Computer Science and Engineering from Zhejiang University in China, and is proficient in Mandarin, Russian, and Bulgarian.

Miguel López de Silanes Gómez, Market Leader International, FOX

Miguel López de Silanes Gómez is the Managing Director for International Members at Family Office Exchange (FOX). He is responsible for delivering FOX services to current members, and actively works to expand the network in Europe and Latin America.

Miguel has most recently been director of the family office for one of Europe's leading real estate families, with specific responsibility for designing and implementing the family's investment strategy and for providing owner education to the younger family members.

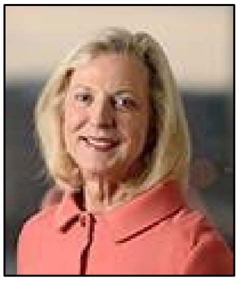
Previously, he worked at UBS Wealth Management in New York, Chile, and other locations in Latin America. He began his career at Bain & Company as an Associate Consultant in London and Madrid. He has an M.B.A. from Harvard Business School and a B.A. in Economics from Universidad Pontificia Comillas (ICADE) in Madrid.

Nate Hamilton, CFA - Vice Chair, FOX

Nate is a seasoned entrepreneur, investor, and advisor with nearly two decades of experience building businesses, investing in private companies, and advising institutional investors and family offices. Nate is the Vice Chairman of Family Office Exchange ("FOX") and Co-Founder and Managing Partner of Heritage Partners Group, a family of companies focused on acquiring, building, and growing private businesses, real estate, and technology assets.

For over a decade, Nate has been a thought leader in the Family Office industry, where he has worked with hundreds of family offices focused on direct private equity and Blockchain investing. Prior to his current roles, Nate worked in private equity, investment banking, and sales & trading, most notably with the Tech & Media Investment Banking group at Goldman Sachs, the Global Macro Hedge Fund group at UBS, and as a Co-founder of FDX Capital, a direct-investment platform built for FOX family offices. Nate has a BS from Vanderbilt, an MBA from Chicago Booth and is a CFA charter holder. Nate relocated from New York City to Florida during the pandemic where he lives with his wife Christy, sons Lochlan and Cameron, and their family dog Champ.

Sara Hamilton, Founder and Board Chair, FOX



Founder and Board Chair of Family Office Exchange (FOX), Sara is a recognized visionary in the private wealth community. While a trust officer at Harris Bank in Chicago in the late 1980s, Sara witnessed the emergence of family wealth management as an industry. Hundreds of U.S. families became centi-millionaires overnight through leveraged buyouts that spawned private financial offices commonly called family offices, to manage family assets and educate wealth owners. Sara was the first professional to recognize family offices as a complex market segment in wealth management.

Sara founded the Family Office Exchange (FOX) in 1989 as a peer network for family office executives. Within 10 years, FOX could see that families needed help with their enterprise vision and managing financial transitions. As a result, FOX evolved into a strategist for family enterprises, a platform for sharing family wealth best practices, and an industry advocate for the importance of private capital in a global economy.

Today, Sara provides strategic direction for FOX and leads the development of new programs and services supporting family enterprises, family office executives and wealth advisory firms in more than 20 countries. She was named one of the Top 50 Women in Wealth Management by Wealth Manager from 2010-2012 and 2019 Outstanding Thought Leader for Wealth Management by Family Wealth Report.

Sara is the co-author of *Family Legacy and Leadership: Preserving True Family Wealth in Challenging* Times and serves on the executive education faculty of the University of Chicago Booth School of Business where she is an adjunct faculty member for their Private Wealth Management course, offered twice per year in Chicago. She is on the founding boards for the Private Directors Association in Chicago and the Foundation for Gender Equality in New York.

Attendee Bios

José Ignacio Ysasi Ysasmendi | Casa Grande de Cartagena S.A.U.

José Ignacio Ysasi-Ysasmendi is the CEO of Casa Grande de Cartagena, S.A. the family office of various members of the Del Pino family. The Del Pino family is the major shareholder of Ferrovial, one of the worlds´ leading infrastructure operators. Ferrovial is currently listed in Spain and Amsterdam and is in the process of listing in the US by the end of the year. Mr. Ysasi is also the CEO of Pactio, a regulated asset management company based in Madrid, which manages, among other, various SICAV which are public open-ended vehicles. Finally, Mr. Ysasi is Secretary and member of the Board of Trustees of the Fundación Rafael del Pino, a leading foundation in Spain, focused, among other topics, in education.

Mr. Ysasi is a lawyer by training and previously worked at the London and Madrid offices of Freshfields Bruckhaus Deringer.

Wouter Lunshof | Eligius B.V.

Wouter Lunshof (1977) is Managing Director at Eligius, a full-service single-family office in the Netherlands. His (key) responsibilities span across investment management, structuring, risk management, (next gen) education, philanthropy, and security. In addition, he is an external investment committee member for a Dutch multi-family office. During his career of over 22 years within the financial industry Wouter held several positions at international banks and wealth management companies. Before joining Eligius he was head of the investments team at UBS Wealth Management in the Netherlands. Wouter holds a master's degree in business economics of the UVA University of Amsterdam, a Postgraduate master's degree in Investment Management of the VU University of Amsterdam and he is a certified investments specialist RBA (Dutch CFA equivalent by CFA partner organization VBA).

Mary Mullens | Family Capital Corporation

Mary Mullens joined Family Capital Corp. in July 2008 as its President. Family Capital Corp. is the private family office of the Brydson Family, a Canadian family with interests in a broad range of businesses. Mary now serves as a director of several family trust companies and as Advisor to the Chair, Special Projects at the family's investment company, Westerkirk Capital Inc.

Mary earned her law degree in 1985 from McGill University, Montreal and has an MBA from the Rotman School of Management at the University of Toronto.

Rob McDonald | Family Capital Corporation

Rob McDonald is an entrepreneur, farmer, and aviation manufacturing advisor. Rob has significant agricultural holdings in both British Columbia and northern Saskatchewan where he grows grain crops for export. Rob provides significant advice and support to De Havilland Aircraft of Canada on matters concerning manufacturing, strategy, brand and marketing and customer engagement.

Rob McDonald | Family Capital Corporation (Continued)

Rob also owns property near Strathmore, Alberta which he intends to develop to support the growth of De Havilland Canada as it relocates its manufacturing and distribution facilities to Wheatland County, Alberta.

Sherry Brydson | Family Capital Corporation

Sherry Brydson is a businesswoman, entrepreneur, and a former journalist and activist. She is the granddaughter of Roy Herbert Thomson, 1st Baron Thomson of Fleet. After starting her career in journalism, Sherry turned her attention to entrepreneurship and business where she now has interests in aviation, manufacturing, the hospitality industry, and media: radio, online and print. In addition to her business interests, Ms. Brydson is a supporter of the arts in Canada and has promoted Indigenous artists and art across the country.

Louis De Clercq | Imocobel FO

Louis joined Imocobel in 2020 and has since then been managing all the firm's investments. Louis started his career at Goldman Sachs in London where he was part of the Leveraged Finance team before joining the M&A Advisory team.

He then joined Groupe Bruxelles Lambert (GBL) where he worked within the investment team. Louis holds degrees in Business & Finance from IE University and the London School of Economics.

Rajaa Mekouar | Imocobel FO

Rajaa is a PE investor and financial entrepreneur with 25 years of experience across private markets globally. She worked as a GP in different funds focused on the mid markets and as an LP with family offices in the UK and across Europe. Rajaa sits on several PE-related family-owned boards in Luxembourg where she moved in 2016, after 15 years in London.

She was awarded "Inspirational Woman in Finance" in 2020 and led the Luxembourg Private Equity Association (LPEA), between 2018 and 2020. There, she launched the PE4W platform to promote Women in PE and the LPEA Insights conference series. Rajaa also supports young artists and musicians and participates in local charity projects.

Rajaa was born and raised in Morocco, studied in France, and spent most of her career in the UK. She speaks 6 languages and is a graduate of HEC Paris (Grande Ecole) and INSEAD (MBA). Rajaa holds three nationalities: Moroccan, Luxembourgish and British.

Francesca Calvaresi | MAIS Holding

Francesca Calvaresi joined Fondazione AIS - Advancing Impact and Sustainability in 2023. As senior relationship manager she supports Fondazione AIS in building and maintaining valued relationships with partners and family groups, private and institutional organizations.

Francesca Calvaresi | MAIS Holding

Lawyer by training, Francesca brings as a background 10+ years of experience in project & relationship management within the University of Bologna's research activities, also in terms of legal counselling and management of negotiations with external funders and corporate partners.

Maurizio Petta | MAIS Holding

Maurizio Petta is CEO of MaIS Holding. He is a Board Member of various leading Italian companies belonging to the Isabella Seràgnoli family or in which the family has a stake. He is also engaged in many boards of not-for-profit organizations and foundations, promoting innovation for the social responsibility of entrepreneurs and their families.

He is also Chairman of the Isabella Seràgnoli family Foundation.

Maurizio Petta holds a PhD in Arts and a PhD in Theoretical Philosophy, both from the University of Bologna. He has attended post-graduate studies at leading international universities such as Columbia University, New York and at the London Business School.

Volker Then | MAIS Holding

Volker has been Chief Executive Officer and Founding Member of the Executive Board, of Fondazione AIS – Advancing Impact and Sustainability, Bologna, since the beginning of 2022. Before he served from 2006 to 2021 as Executive Director, Centre for Social Investment, Heidelberg University.

Previously he held positions as senior program officer of the Bertelsmann Foundation from 1994 to 2006, for the last seven years as Director Philanthropy and Foundations. From 2014 to 2016 Volker Then was member of the National Advisory Board for Germany of the G7 Social Impact Investment Task Force and consequently involved in setting up the German follow-up organization. Since 2021 he also served as Scientific Advisory Board member of the OECD Global Action on the "Social and Solidarity Economy". During his career Volker has been a member of multiple boards in philanthropy and the non-profit-sector (including EFC and US Council on Foundations).

As a serial entrepreneur he has founded several of the organizations he has led. His strategic interests focus on impact and impact measurement, social investment, as well as entrepreneurial and organizational strategy. He highly values interdisciplinary work and relevant bridging between academia and practice.

Paul Verheul | MerweOord B.V.

Paul Verheul is the Executive Director of MerweOord (the Van Oord Family holding) since 2020 and has various (chairman of) Supervisory Board positions in the Maritime and Automotive industry and for a charity foundation (mainly in Family-owned businesses).

Paul Verheul | MerweOord B.V. (Continued)

During the COVID-19 crisis he was also appointed by the Dutch Minister of Health, Welfare and Sport as Supervisory Board member of SON (Stichting Open Nederland – Foundation Open Netherlands). He was Executive Board member of Van Oord from 2011 till 2019, one of the world leading companies in Dredging and Offshore Wind. In that role he set up a sustainability program covering all operations worldwide and he was responsible for, among other things, the realization of agreed strategy and business targets.

Paul Verheul started his professional career in 1981 at Royal Netherlands Navy (RNLN) in various jobs. In 1998 he shifted to the airline business in various roles; starting at Transavia Airlines as Vice President Engineering & Maintenance followed by a transfer to Schreiner Aviation Group as COO in 2003.

From 2005 till 2011 Paul was appointed as CEO of the Driessen Aerospace Group (in addition to this CEO role, he was also appointed Member of the Executive Committee of Zodiac Aerospace in 2008). Paul is married and has 3 children.

Yvette Van der Kloet | MerweOord B.V.

Yvette is Deputy Director MerweOord, the holding company of Van Oord NV (a marine construction company established in 1868, with a turnover of € 2.7 billion) and Acta Marine (a shipping company with a turnover of € 70 million) and some smaller companies. Together with Paul Verheul (Executive Director MerweOord) she is responsible for safeguarding and structuring the private interests of the 113 family shareholders and representing them as shareholder towards the operating companies. Besides important MerweOord topics such as diversification, governance, family purpose and organization of the Family Office, Yvette's primary focus is on legal/fiscal/financial/educational matters related to the individual shareholders. Within the Family Office there is a close cooperation with the Family Association and the Family Foundation (philanthropy).

Before joining MerweOord in 2017, Yvette worked in the financial services industry for more than 30 years and she had several supervisory roles in different organizations. Currently she holds a board position with the holding of the BDR Thermea Group, active in heating and cooling, turnover of € 2.5 billion; the company used to be family owned but is now owned by a foundation.

Pierre Morrissette | Pelmorex

Born in Montreal, Mr. Morrissette completed a degree in Economics at Loyola College in 1968. He completed a master's Business Administration degree from the Richard Ivey School of Business in 1972.

Mr. Morrissette began his career in the banking industry, but by 1977, had shifted to the communications sector. From 1977 to 1979, he was Vice-President of Finance with Telemedia Communications Inc., and the Senior Vice-President and Chief Financial Officer of the company from 1979 to 1982. He served as President of Telemedia Ventures (1983) and was then appointed President and CEO of Canadian Satellite Communications (1983-1989).

Pierre Morrissette | Pelmorex (Continued)

Mr. Morrissette founded Pelmorex Media Inc. in 1989, and the company purchased The Weather Network and MeteoMedia in 1993.

Francesco D'Amico | Philos & Partners

Mr. D'Amico is advising and taking care of the interests of a number of international families. In 2019 Mr D'Amico founded Philos&Partners in order to assist his clients in family governance, investment management and family office services.

Until 2019 Mr. D'Amico has been deputy CEO, member of the Executive Committee, and responsible for all client matters and the development of Quilvest Switzerland (QVS), a family-owned international multi-family office. He has conducted a number of international estate planning and family/investment governance projects organizing and managing complex Trusts, Foundations, and legal structures systems.

Francesco D'Amico | Philos & Partners (Continued)

Mr. D'Amico sits on various boards of family offices and foundations, primarily advising on family governance and family office matters. Prior to joining QVS, Mr. D'Amico was the CEO of Unicredit Private Wealth Advisory, the multi-family office of Unicredit Group. He also headed the Private Banking Marketing Unit of Unicredit-HVB Group (UCI). Mr. D'Amico joined UCI after 10 years of experience in the Wealth Management industry in Switzerland, as a management consultant and senior banker.

Markus Stadlmann | Philos & Partners

After several years in institutional asset management, Markus Stadlmann made the conscious decision to manage private wealth from then on. He held leading investment roles at a bank owned by the Hilti family, at Harald Quandt Holding and HQ Trust, as well as Philos & Partners—a family services firm he joined very recently. In previous positions, Markus headed the global discretionary investment team at Barclays Wealth and acted as Chief Investment Officer of Lloyds Private Bank. He graduated from the University of Chicago School of Business, earning an MBA.

Markus has been giving lectures and seminars on business ethics and corporate sustainability at various universities for the last seventeen years. He is married to Christine. They have two sons and two daughters. Markus is a runner and skier.

Giovanni Moratti | Saras

Giovanni Moratti is a sustainability specialist with a core expertise in Ecological Economics and Regenerative Economics.

He graduated at Università Statale di Milano in Philosophy of History and then at the London School of Economics in Philosophy, where he has been awarded a Master of Science in Philosophy of the Social Sciences . His core research and dissertation topic has been Ecological Economics. In 2020 he obtained a postgraduate certificate in Sustainable Business at the Cambridge Sustainability institute, focusing on the topic of Regenerative Economics.

Giovanni Moratti | Saras (Continued)

He worked for the European Commission at the Directorate General of Education and Culture and as a researcher at the Human Rights Commission of the Italian Senate, focusing on the topic of climate migrations.

He has a long time experience in the impact economy ecosystem, and Co-Founded with Massimiliano D'Amico and The Unreasonable Institute "Gli Irragionevoli", an impact accelerator based in Milan.

He currently works as Energy Transition Chief at Saras, where he manages the Energy Transition Roadmap of the company. Furthermore, he founded and currently directs Regg3, an innovative startup focused on Dynamic Systemic Models to capture net systemic impact of companies, funds and policymakers

James Hickman | Sovereign Man

James Hickman is a graduate of the United States Military Academy at West Point and former US military intelligence officer who has started or acquired businesses in industries as diverse as banking, fashion, technology, media, and agriculture. He has traveled to 122 countries on all seven continents and has lived in 10. He currently lives in Puerto Rico with his wife and two small children.

Amber Slattery | St Etrephine Private Office

Amber is a single-family office director for a US, Portugal, and UK-based family. She manages the investment, tax, asset location, cash management, and inheritance strategy for the family. In addition, Amber works as a next gen education coach.

She works directly with teen and early-20s clients, creating custom programming based on their individual interests and needs. Amber also serves as a consultant to a startup focusing on next gen education for children in the 4–10-year-old space.

Prior to this work, Amber resided in Philadelphia and worked as a wealth strategist to ultra-high net worth families in a US multi-family office, where she concentrated on families with young family members and art-owning families. Amber graduated from Villanova University School of Law in 2013 and is licensed to practice law in Pennsylvania. Amber graduated from Boston College in 2010, where she obtained her B.A. in Art History and Political Science. Amber resides in Paris.

Joanna Marinova | Tsotsorkov FO

Joanna Marinova's journey is marked by her relentless pursuit of excellence and a deep commitment to effective philanthropy. She began her academic career at the University of Toronto graduating with an honors degree in International Relations and Economics. Upon completing her undergraduate studies, Joanna embarked on a career with Wellington Management, a preeminent private investment management firm. However, her passion for advocacy soon steered her in a different direction, compelling her to leave the world of finance behind.

Joanna Marinova | Tsotsorkov FO (Continued)

A lifelong learner, Joanna holds a management certificate from Harvard Business School and an MBA from the American University in Bulgaria, where she was recognized for her NGO expertise. Her achievements have earned her prestigious awards, including recognition from the United Nations and Harvard. Returning to Bulgaria in 2016 after over two decades of international experience, she took on the role of Executive Director at the "Lachezar Tsotsorkov" Foundation, leveraging her 15+ years of organizational leadership. Her work is focused on maximizing impact through targeted philanthropy in the areas of healthcare, culture, education, and children's rights.

Michelle Jezycki | Tsotsorkov FO

Ms. Jezycki is the President of Trifecta Consulting, a US based Human Resources Management company. Trifecta specializes in leadership development, executive coaching, human resources development, strategy, team building, retreats, and business management.

Ms. Jezycki is the former Director of Human Resources for the United States Senate.
She is a Visiting Associate Professor at the American University in Bulgaria teaching Leadership in their EMBA program. Ms. Jezycki also owns a real estate business in the US assisting clients with residential, commercial and investment needs. She is pleased to be advising the Tsotsorkov Family Office.

Maarten de Groot | VU University

Doctor of Philosophy (PhD) candidate at Vrije University Amsterdam School of Business and Economics. His research is focused on wealth preservation and the role of the family office.

Maarten worked in Amsterdam, London, Hong Kong and Frankfurt in investment management and corporate banking. In 1996, he co-founded VermogensGroep, the largest multi-family office in The Netherlands, managing $20 billion for 100 ultra-high net worth clients.

He served as CEO and sold the company to UBS in the summer of 2008. Maarten serves on the International advisory Board of the Juvenile Diabetes Research Foundation in New York, USA. He founded JDRF in the Netherlands, and he is chairman of the board. Maarten studied quantitative business economics at Vrije Universiteit, Amsterdam, and complemented his education with study at Harvard Business School in Boston, Insead in France and IMD in Lausanne.

Speaker Bios

Laura Dale-Harris | Global Treehouse Foundation

Founder Director of the Global Treehouse Foundation, Laura is building a community of providers, founders and experts that brings entrepreneurial expertise and innovation to address the lack of access to children's palliative care globally.

Passionate about making things happen, Laura has 13+ years' experience establishing new initiatives at the intersection of healthcare, social impact, and innovation, most recently as part of the senior management team of Social Finance. Laura's experience includes leading the launch and delivery of the first social impact bond in end-of-life care and scaling innovative services to tackling domestic abuse. In her previous role at the Monitor Group, Laura helped start and run Insights for Care, a public-private sector research collaboration, finalist of the Prix Galien. Laura's thought leadership received coverage from the Wall Street Journal.

Nicolas Petitjean | Partners Group

Nicolas Petitjean is part of the Private Equity Partnership Investments business unit, based in Zug. He is a member of the Private Equity Partnership Investment Committee and the Private Equity Direct Co-Investments and Direct Lead Growth Investments Investment Committees. He has been with Partners Group since 2013 and has 18 years of industry experience, previously working at Perennius Capital Partners which was integrated into Partners Group in 2013 and Société Générale Corporate & Investment Banking in M&A and structured finance. He holds a master's degree in finance from EMLYON Business School, France.

Raniero Proietti | Partners Group

Raniero Proietti is Head of Client Solutions for Southern Europe, France, and Israel as part of the European Client Solutions business unit, based in Zug. He has 30 years of industry experience and, prior to joining Partners Group, was a Partner at Perennius Capital Partners, which was integrated into Partners Group in 2013. Raniero's previous roles also include BNP Paribas, as Country Head of Capital Markets in Italy; Citigroup, as Co-Head of the Capital Markets division in Italy; and Lehman Brothers. He holds a master's degree in economics from the University of Rome Tor Vergata, Italy.

Frederic Zwahlen | Partners Group

Frédéric Zwahlen is part of the Client Solutions South of Europe team of Partners Group, based in Zug and has 6 years of industry experience. Prior to joining Partners Group, he worked as a consultant at Capco in the Banking and Payment team covering the Swiss market. He holds a master's degree in international finance and a CEMS master's in international management from Nova School of Business and Economics, Lisbon, Portugal.

Meg Pagani | PFC Family Office

Meg Pagani is an entrepreneur, speaker, and impact strategist.

Over the last 10 years she worked and travelled in ~30 countries studying models of growth, impact and system change with local communities, organizations, and ancient traditions. Today she works with investors, founders, and activists to reframe the topic of power and align leadership strategies with the principles of nature, and she collaborates with the Yorenka Tasorentsi Institute of the indigenous Ashaninka leader Benki Piyãko.

She is a Forbes 30under30 and fortune 40under40 founder and a member of the Global Regeneration Colab.

Phil Collins | Orchard Holdings Group

Phil Collins is Founder, CEO and Managing Director of Orchard Holdings Group, which makes private investments on behalf of a select group of private investors. The firm previously served as a captive direct investment arm of the family of Richard T. Farmer, founder of Cintas. Its investment strategy leverages a long-term, patient capital perspective, and seeks to differentiate itself by having greater flexibility than institutional private equity funds.

Previously, he was a Managing Director of McCown De Leeuw & Co. – a $1.2 billion middle-market private equity investment firm in New York City and Menlo Park, California – where he served on the investment committee and was involved in leading numerous growth company investments. Phil started his career working for private investment pioneer Carl H. Lindner, Jr., then Chairman, CEO and Founder of American Financial Group, a large diversified financial services and investment company, and as a consultant at McKinsey & Co. He is a graduate of The University of Cincinnati and received an MBA with distinction from Harvard Business School. He has been a director or Chairman of several privately held companies, and in 2016 was appointed by Governor John Kasich to the Board of Trustees of the University of Cincinnati, where he currently serves as Chairman. He also serves as a Director of UC Health, as Chair of the Investment Committee for the University's $2 billion endowment and on the Board of Directors of the Harvard Business School Club of Cincinnati.

MEETING EVALUATION

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