



Family Office Roundtable



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Introduction

The Family Office Roundtable ("FOR") was established in January 2005. The founding members are managers and principals of some of Europe's most sophisticated family offices. Membership of FOR has grown steadily and now includes major family offices from the UK, Europe, the US, the Middle East and the Far East. FOR differentiates itself in a number of ways: through a focus on a membership of predominantly single family offices; through a high proportion of principals and leaders of such families; and through a well informed focus on investment issues.

Purpose

The overall goal of the FOR is to assist family offices in their ongoing challenge of remaining vibrant and entrepreneurial. We do this by establishing a forum to bring together family office principals and investment managers from across Europe and internationally who share an interest in investment, including private equity, hedge funds, real assets and public market investing. The aim is to facilitate:

- Establishment of broader international networks
- Collaboration, benchmarking and sharing of best practices
- Market feedback and insights

Frequency

Events are held quarterly, either in London or alternatively in one of the main European centres.

Structure

The events will be low key, private and select. We run dinner events, focused on investment matters and peer to peer networking, and breakfast events, to which we invite managers and experts to focus on specific investment themes.

Membership

Membership is free and strictly by invitation only. Invitees will be European and international family office members, both principals and managers. Attendance will be limited to 8-12 people for dinners and 15-20 people for breakfasts.

Confidentiality

The membership list, individual members' details and details of member organizations will be held in strictest confidence.

Basis

The events are operated on a not-for-profit basis and attendance is free. We operate a rotating host policy where participants agree to act as hosts on an occasional basis.

Organisers

The Family Office Roundtable was founded by Somerset Capital. If you would like more details please contact Jim Miller at E. jim@som-cap.com or visit our website at www.som-cap.com



Family Office Roundtable Events

We held quarterly event since inception January 2005, including events in London, Zurich, Munich, Paris and Dusseldorf. A sample listing of events is included below:

2013

"Philanthropic Roundtable – How can wealthy families help eradicate poverty" – 21st March 2013

Hosted by Somerset Capital and presented by Dr Percy Barnevik, Hand in Hand in London

"FOR Dinner - Lessons learned from a major succession" – 16th May 2013

Hosted by a UK based SFO in London

"Social Impact Investing" – 12th September 2013

Hosted by a French SFO in Paris with presentations by Hermes, Groupe SOS and The Big Issue Ltd.

2012

"FOR Real Estate Private Equity Event – New models for investing in Western Europe, opportunities in Latin America and direct opportunities in Czech Republic" – 3rd December 2012

Hosted and presented by a group of real estate investors at Four Seasons Park Lane London

"FOR Dinner – Challenges of establishing a first generation family office" – 15th November 2012

Hosted by the Principal of a 1st generation SFO at Sushi des Artistes in London

"FOR Dinner – Challenges of Direct vs Fund Investments in Private Equity" – 16th April 2012

Hosted by one of our family office forum members at Hawksmoor in the City with presentations by a leading leisure sector investor

2011

"Investing in the Cloud Computing revolution" – 6th September 2011

Hosted by Somerset Capital with presentations by a leading cloud computing investor

"Uncovering the Layers of Private Banking Fees" – 10th May 2011

Hosted by a London based MFO with presentations by a cost cutting advisory group

"FOR Dinner" – 16th February 2011

Hosted by a German SFO at Industrie Club in Dusseldorf

"Asset Allocation in a Changing World – Focus on Asia" - 17th February 2011

Hosted by a German SFO with presentations by a leading German academic, a leading economist, and an Asian fund of funds in Dusseldorf

2010

"An initiative to establish a syndicate of European family offices in the area of cleantech and renewable investment" – 25th November 2010

Hosted by the venture arm of a German SFO with presentations by a US SFO in London

"The distressed debt and real estate opportunity for family offices" - 21st September 2010

Hosted by a London based SFO with presentations by a London based SFO and a US distressed debt investor

"Direct real estate investment – practical solutions and opportunities" - 25th May 2010

Hosted by Jones Lang LaSalle (JLL) with presentations by real estate investors

"FOR Dinner" - 18th March 2010

Hosted by Hoares Bank in London

"An operational approach to Private Equity" - 17th February 2010

Hosted by a South African SFO with presentations by private equity investors



Family Office Roundtable Events (continued)

2005 - 2009

"FOR Dinner" – 3rd December 2009

Hosted by a London based MFO at the Principal's London house

"CleanTech Market – Opportunity in Private Equity" - 11th November 2009

Hosted by a London based SFO with presentations by clean tech investors

"FOR Dinner" – 25th June 2009

Hosted by Somerset Capital at Memories of China in London

"The Secondary Market – Opportunity in Private Equity" - 1st May 2009

Hosted by Harbourvest with presentations by secondary investors

"FOR Dinner" – 12th February 2009

Hosted by a London based MFO

"Turnaround and Restructuring" – 9th December 2008

Hosted by a London based SFO with presentations by turnaround investors

"FOR Dinner" - 4th December 2008

Hosted by Somerset Capital at Park Hyatt Hotel in Zurich

"FOR Dinner" – 18th September 2008

Hosted by a London based MFO

"FOR Dinner" - 26th June 2008

Hosted by a Norwegian SFO at Poissonnerie De L'Avenue in London

"FOR Dinner" – 3rd April 2008

Hosted by Somerset Capital at Zuma in London

"FOR Dinner" – 4th December 2007

Hosted by a London based SFO at Villa Blanca in London

"FOR Dinner" – 10th July 2007

Hosted by a London based MFO at The Greenhouse in London

"FOR Dinner" – 22nd February 2007

Hosted by Somerset Capital at Automat in London

"FOR Dinner" – 8th September 2006

Hosted by a London based MFO in London

"FOR Dinner" – 8th February 2006

Hosted by Somerset Capital at Bleeding Heart in London

"FOR Dinner" – 29th September 2005

Hosted by a German SFO at Oktoberfest in Munich

"FOR Dinner" – 30th June 2005

Hosted by a London based MFO in London

"FOR Dinner" – 21st April 2005

Hosted by a London based SFO at Villa Blanca, Hampstead in London

"FOR Dinner" – 11th January 2005

Hosted by Somerset Capital at Memories of China in London