

The First Entrepreneur Annual Conference

ENTREPRENEUR OFFICE

COMPETITIVENESS - ENDURANCE - ENTREPRENEURSHIP

*A TEAMWORK APPROACH TO HELP YOU NAVIGATE YOUR
FAMILY BUSINESS TO SUCCESS IN TURBULENT TIMES !*

Julien Pitton
Executive Director
Head of Entrepreneur Office
FERRIER LULLIN & Cie SA, Geneva

Professor Randel S. Carlock, Ph.D.
Berghmans Lhoist Chair in
Entrepreneurial Leadership
INSEAD, France and Singapore
Opus Professor of Family Enterprise
UNIVERSITY OF ST THOMAS,
Minneapolis

Christian Wolfensberger

Victoria Nel

Suzanne Schutte

Grant Gordon
Non-Executive Director,
WILLIAM GRANT & Sons Ltd

Norman Rentrop
Chairman,
RENTROP OFFICE, Bonn

John Chapman
Partner,
TECHNO VENTURE MANAGEMENT,
Munich

Jean-Claude Falcicola
Partner,
EGON ZEHNDER ASSOCIES SA,
Geneva

Joseph Field
Partner,
WITHERS, London

Marnin Michaels
Partner,
BAKER & MCKENZIE, Zurich

Jerry Hourihan
European Manager,
CHUBB MASTERPIECE, London

Jeremy Soames
Managing Director,
MARSH PRIVATE CLIENT SERVICES,
London

Christian H. Kälin
Partner,
HENLEY & PARTNERS, Zurich

Philippe Szokoloczy-Syllaba
Lawyer & Head of Family Office
HERITAGE FINANCE & TRUST,
Geneva

Martin Katz
Director,
WELLINGTON SHIELD, Naples USA

Jonathan Conder
International Tax Partner,
MACFARLANES, London

John Riches
Partner,
WITHERS, London

19 & 20 March 2002, Le Richemond Hotel, Geneva

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NEMIAN LIFE



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ESAFON

The European Strategic Advisors & Family Offices Network



Letter of the President

Dear Family Business Owner,

Navigating a Family Business is challenging and requires endurance, leadership and entrepreneurship.

Whilst focusing on increasing your business competitiveness and at the same time solving endless problems, you then get time short to build up a strong network of sound advisers to help you plan the transition phases linked with the life cycle of the business.

From the initial stage of "paper wealth" or illiquid assets to the transmission of entrepreneurial skills to the next generation to take over the helm, the conference will cover the full spectrum of the duties and responsibilities that a first generation's Entrepreneur has to face in the process of creating wealth for himself and his or her Family.

Processing "paper wealth" into marketable securities and maximizing the competitive advantage of the business is the Entrepreneur's mission whilst ensuring Family Stewardship and unity for a long-term commitment to continuity.

To achieve these goals, Entrepreneurs need to rely on key experts and advisers who understand the complex interplay between Family Dynamics and business decisions.

Therefore, this conference will give invaluable insights into the specific needs of Entrepreneurs as they move through transitions.

I look forward to meeting you in Geneva next March 19 & 20 2002 to exchange ideas and network in a very professional and friendly environment.

Yours faithfully

François Golbery
Chief Executive Officer
MGI (Switzerland) S.A.

OUR PARTNERS

We are particularly grateful to our partners who have contributed to the high quality of this programme.

FERRIER LULLIN: Founded in 1795, Ferrier Lullin is the oldest private bank established in Geneva. It is exclusively dedicated to private banking for high net worth individuals, families and entrepreneurs and provides them with high quality advice and solutions that cover all aspects of wealth and asset management. With 380 employees, Ferrier Lullin has locations in Switzerland (Geneva, Lausanne and Sion), Luxemburg and the Bahamas. Ferrier Lullin has created in 2001 the first Entrepreneur Office in the Private Banking industry.

CHUBB: Founded in 1882, the Chubb Group of Insurance Companies is a global insurance organisation with the highest credit ratings for financial strength. It provides businesses, senior company executives, and affluent homeowners with specialist insurance programmes related to their particular needs. Chubb is an expert in Family Office insurance and is the world's leading specialist insurer of privately owned fine art and jewellery.

NEMIAN LIFE: operates in the pan-European cross-border market under the Freedom to Provide Services rules and delivers specialized financial services, using life insurance wrappers, to (private) bankers, portfolio managers, investment consultants and IFA networks. Nemian Life & Pensions provides the insurance platform on which its partners can create their own and labeled "asset management based" life insurance products without needing to invest in an administrative back office.

PARTICIPANT PROFILE

- Entrepreneurs moving their businesses through transitions
- Close advisers rethinking their relationship with family business clients in new innovative ways

First Day 19 March 2002

8.45 Coffee and Registration

9.15 Opening Remarks by the Chairman

Julien Pitton
Executive Director
Head of Entrepreneur Office
FERRIER LULLIN & Cie SA, Geneva

9.30 Fulfilling the Entrepreneur's Wealth Cycle: The Entrepreneur's Office Concept

Julien Pitton
Executive Director
Head of Entrepreneur Office
FERRIER LULLIN & Cie SA, Geneva

10.15 "The Challenges of Managing High Growth"

- Protecting the entrepreneurial culture
- Managing change: developing a learning organization
- Becoming an "Entrepreneurial Leader"

Professor Randel S. Carlock, Ph.D.
Berghmans Lhoist Chair in Entrepreneurial Leadership
INSEAD, France and Singapore

Opus Professor of Family Enterprise
UNIVERSITY OF ST THOMAS, Minneapolis

11.15 Coffee Break

11.45 Panel Discussion: "Fostering An Entrepreneurial Spirit Within Wealthy Families"

Young family members of diverse cultural and business backgrounds will discuss their own personal experiences with entrepreneurial efforts, explore how an entrepreneurial spirit can be fostered within family structures and values, and share best practices.

Christian Wolfensberger, a member of a prominent Swiss Family
Victoria Nel, a member of a prominent German Family
Moderator: **Suzanne Schutte**, New York
Suzanne Schutte has wide experience in the field of wealth management, and is a recognized industry speaker on the topics of private banking, family offices and wealth management practices in the U.S. Her experience includes director positions at Rockefeller & Company, Brown Brothers Harriman, and the Chase Manhattan Private Bank, managing these firms strategic wealth expansion activities, product development, and marketing and business development initiatives in the high net worth sector.

13.15 Lunch offered by NEMIAN LIFE

14.45 A Spirited Story of Long-Team Stewardship

Exploring key family and business drivers for sustainability and success in a 5th generation cousin - consortium business.

Grant Gordon
Non-Executive Director,
WILLIAM GRANT & Sons Ltd

Grant's previous background is in international marketing & commerce where he spent the first twenty years of his career in the development of William Grant & Sons Ltd, a 5th generation family owned Scotch Whisky company, owners of Glenfiddich Single Malt brand. He is now a non-Executive Director of the family company. He also currently sits on a number of other boards as non-Executive Director, including Laurent-Perrier S.A., the family controlled and publicly quoted Champagne house.

15.30 Running Your Private Portfolio like Your Business: transferring sound business principles like boards, checks & balances, strategic planning from your business to your private portfolio.

Norman Rentrop
Chairman,
RENTROP OFFICE, Bonn

Norman Rentrop (born 1957) started his own professional publishing company in 1975: Verlag für die Deutsche Wirtschaft AG today is one of the leading German professional publishing companies with annual sales of about 100 Million US Dollar for the group

16.15 Afternoon Tea

16.30 A Venture Capitalist View on Entrepreneurship

John Chapman
Partner,
TECHNO VENTURE MANAGEMENT, Munich

17.15 Teams at the Top as a Prevailing Form of Leadership

Jean-Claude Falciola
Partner,
EGON ZEHNDER ASSOCIES SA, Geneva

18.00 Close of day one

Second Day 20 March 2002

8.45 Opening Remarks by the Chairman

Joseph Field
Partner
WITHERS, London

9.00 International Tax and Insurance Planning For International Entrepreneurs

- What tax planning techniques can be used to minimize taxation at the outset of the business?
- Share option schemes: What are the pitfalls for the unwary?
- Uses of life insurance in protecting the new business against unforeseen events
- What are some uses of life insurance in tax planning so as to minimize global taxation

Martin Michaels
Partner,
BAKER & MCKENZIE, Zurich

9.45 Protecting Personal Wealth

- An overview of the personal risks faced by today's entrepreneurs
- Risk management as a vital part of the wealth management equation

Jerry Hourihan
European Manager,
CHUBB MASTERPIECE, London

and

Jeremy Soames
Managing Director,
MARSH PRIVATE CLIENT SERVICES, London

10.30 Coffee Break

11.00 Relocation of Business and Change of Private Residence: The Advantages of Switzerland

Christian H. Kälin
Partner,
HENLEY & PARTNERS, Zurich

11.45 A Review of Entrepreneurial Wealth Holding Structures in Europe in the Light of Supranational Initiatives

Philippe Szokolocz-Syllaba
Lawyer & Head of Family Office
HERITAGE FINANCE & TRUST, Geneva

and

Joseph Field
Partner,
WITHERS, London

12.45 Lunch offered by



14.45 Benefits of and Strategies for Going Onshore through New Zealand and USA

- New Zealand as a base for Common Law Trusts
- The USA as a tax haven
- Using USA as an administrative base

Martin Katz
Director,
WELLINGTON SHIELD, Naples USA

15.15 Trustee Issues in Managing and Disposing of a Family Business

- Managing fiduciary risks associated with holding private company shares
- Should trust officers become directors?
- Avoiding personal liability on a disposal
- Issues regarding the use of proceeds

Jonathan Conder
International Tax Partner,
MACFARLANES, London

Tax Issues Arising on a Sale or Disposal of the Business

- Deciding on the appropriate exit strategy
- Issues specific to different types of sale consideration
- Quoted securities – hedging / monetising strategies

John Riches
Partner,
WITHERS, London

16.15 Close of the conference

Objectives:

- Recognize the importance of building and maintaining relational wealth through alliances and networks
- Understand the complex interplay between family dynamics and business decisions
- Plan and prepare transition phases along side the business cycle
- Foster entrepreneurship and effective governance of the family
- Manage high growth
- Identify significant success factors in a family business and fulfil the needs of Entrepreneurs

WHAT PARTICIPANTS SAID ABOUT THE 2ND ANNUAL FAMILY OFFICE CONFERENCE September 26 & 27 2001

- **As a family member** starting a family office, it was very interesting
- Very interesting, **high quality** presentations and explanations based on experience cases
- **Well organised** and concentration on quality speakers
- Most of the speeches met my expectations, **worth to come to Geneva**
- Very good (as usual)
- Good speakers on **very high standard**
- **Pleasant & friendly** customer service
- Overall very **useful program**
- **Very professional** and good content

Registration form

ENTREPRENEUR OFFICE

March 19 & 20, 2002 - Le Richemond Hotel - GENEVA

How to register

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

Date and venue

Conference - 19 & 20 March, 2002 (C0204)

Le Richemond Hotel
Jardin Brunswick - CH-1201 Geneva

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

A 50% discount will be granted for accompanying entrepreneur's staff members

Including refreshments, luncheon and a full documentation package, the fee for the conference of 19 & 20 March, 2002 is:

CHF: 2950.- (+VAT)

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To receive full details, please send an email to Anne Golbery – agolbery@mgi-direct.ch

Payment

- By bank transfer:**
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Cancellation policy

Cancellation up to one month in 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 of MGI SA and cannot be copied under any circumstances.

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YES, I wish to attend the conference (C0204)

Mr. / Mrs. / Ms. :

First Name :

Job Title :

Company :

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Invoice to be addressed to :

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Payment upon reception of the invoice will guarantee access to conference.

Date : Signature :

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