



DC Finance's Global Family Office Community Presents
**THE UAE GLOBAL FAMILY WEALTH
AND INVESTMENT FORUM**

A window to new friendships and opportunities in the family business world

Business Impact | Shared Growth | Prosperity
24th – 25th January 2023 | Saadiyat Rotana Resort & Villas, Abu Dhabi

CONFERENCE AGENDA | DAY 1

24th Jan 2023

08:15 – 09:00

Forum Registration & Refreshments

08:30 – 09:00

Private Family Majlis

A private, invitation only majlis will be available during this time for family leaders to gather, socialise and discuss pertinent private news.

09:00 – 09:10

HONORARY CHAIR'S WELCOME

Fatima Al Jaber, *Board Member*, Al Jaber Group

09:10 – 09:30

KEYNOTE ADDRESS

H.E. Shames Ali Khalfan Al Dhaheri, *Board Member*, Abu Dhabi Chamber of Commerce

09:30 – 09:40

HE Ambassador Amir Hayek, Israeli Ambassador to the UAE

09:40 – 10:15

THE FUTURE ECONOMY


Non-Oil Economic Diversification & Global Expansion Plans

- Increasing trade, commerce and the value for non-oil diversification
- Advancing Comprehensive Economic Partnership Agreements (CEPA) and cementing deeper ties with key global nations
- Transforming the economic infrastructure, diversifying markets and facilitating new investments in a rapidly expanding ecosystem
- Enriching developmental and economic projects across key sectors

H.E. Fahad AlGergawi, *CEO*, Dubai Investment Development Agency (Dubai FDI)

Magnus Olsson, *Co-Founder*, Careem

Moderator: **Yaser Al Yousuf**, *Director - Abu Dhabi Residence Office*, Abu Dhabi Department of Economic Development



10:15 – 10:35

THE FUTURE OF FOOD & BEVERAGE INDUSTRIES

How New Technologies Will Change How We Eat for the Better

For decades, global populations around the world have witnessed a surge in illnesses such as obesity and diabetes. Governments, health organizations and consumers are calling on food and beverage manufacturers to improve the nutritional quality of their products by reducing harmful ingredients like sugar. During this session, we uncover what the future of food will look like, the transformative changes already taking place and how it will shape industry and consumer lifestyle for the better – from biotechnologies like bioconversion and fermentation capable of dramatically transforming the industry and consumer diets.

Luca Giannon, *Senior Vice President*, SweeGen

10:35 – 11:00

Morning Refreshments & Coffee Break

11:00 – 11:30

GROWTH & LEGACY


“Inspiring Reality, Sustainable Future”

This discussion brings together an affluent group of female pioneers and owners sharing their familial, entrepreneurial and business experiences in ways which cultivate growth and sustain legacy.

Shaikha Al Nowais, *Vice President – Owner Relationship Management*, Rotana Hotels

H.E. Noor Al Tamimi, *Founder & CEO*, Bedashing Holding Company, *Board Member*, Abu Dhabi Business Women Council

Moderated by: **Fatima Al Jaber**, *Board Member*, Al Jaber Group



11:30 – 11:50

BUILDING THE SFO OF THE FUTURE

Structuring and Evolving the Family Office to Support the Strategy and Legacy of your Family

Recent years have put traditional family holding and SFO structures to a serious test, and in response to these challenges, nowhere has the ecosystem evolved as fast as in the Middle East. When considering a consolidation or structuring optimization, starting a SFO or re-evaluating an existing one, it is important to evaluate the latest global trends and options in terms of jurisdictions and tools – from the “do’s and don’ts” to understanding what regional families are doing, why, and what can be learnt? This session helps families navigate the latest trends in the wealth management and structuring space.

Yann Mrazek, *Managing Partner*, M-HQ

11:50 – 12:10

Afternoon Refreshments & Coffee Break

12:10 – 12:40

FAMILY OFFICE PANEL: PORTFOLIO CONSTRUCTION


Strategic Asset Allocation - Priorities, Practices & Performance

- Assessing the impact of the pandemic, climate and industry events on macro-economic factors - liquidity, currency, inflation, growth
- Views and action taken on a diversified portfolio construction - equity, fixed income, PE and debt, RE, energy and commodities
- Tactical and Strategic changes to asset allocation - and the shifting investment landscape cascading from global economic challenges
- Crystal gazing into 2023/2024 - asset classes, risk approaches, sectors, trends

Maher Al Kaabi, *Co-Founder*, Blink Lab; *Advisor to Group Chairman & Independent Board Member*, Alserkal Group

Nicholaus Rohleder, *CIO*, Mid-America Holdings

Moderated by: **Nitai Utkarsh**, *Single Family Office*, Hero MotoCorp



12:40 – 12:55

LEADING FROM THE FUTURE

Insights on Impact Investment for Family Companies

Tariq Qureishy, *Futurist*; and *CEO*, Xponential

12:55 – 13:10

THE VIRTUAL FAMILY OFFICE

Family Offices and Digital-First Requirement

Digitization within family offices has shifted from an innovation to an obligation. To mitigate risk, remain relevant, and operate efficiently, it is essential that family offices transform their infrastructure and embrace technology. This presentation will discuss why change is critical and how family offices can adopt it.

Rob Mallernee, *Founder & CEO*, Eton Solutions

13:10 – 13:20

LA DOLCE VITA

The Closely Held Secret of Italy

Walter Andreoni, *Tax Partner*, Mercanti e Associati LLP

13:20 – 14:40

Networking Lunch

14:40 – 15:00

IN CONVERSATION WITH OMAR AL HANDAL

Creating a Culture of Continuity

During this session, Omar Al Handal – grandson of the founder of Al Handal International Group (HIG) – shares 3 generation’s worth of insight and experience on the importance of family governance and necessity for structural evolutions, the role of a meritocracy-based culture and how adversity can be a catalyst for positive change.

Omar Al Handal, *Managing Director*, Al Handal International Group
Interviewer: **Aneel Khan**, *Founder*, 1821; *Orbital Director*, The Salon - Optima Orbits

15:00 – 16:00

THE FALCON ECONOMY, TECH ECOSYSTEMS & UNICORNS

The Impact of Technological Evolution and Digital Innovation on the Global Stage

- Transformative technologies and digital innovation - disrupting traditional businesses and inefficient markets to create value
- The impact of the next wave of AI, data and blockchain evolutions
- The ‘The Falcon Economy’ on the global stage
- Championing innovation, start-up and venture ecosystems

H.E. Salma Al Qubaisi, *Director*, Salma Al Qubaisi Holding, Emirati Tech Business Woman Leader

Dr Anand Govindaluri *Chairman*, Govin Holdings; *Chairman & CEO*, Govin Capital


Maher Al Kaabi, *Co-Founder*, Blink Lab; *Advisor to Group Chairman & Independent Board Member*, Alserkal Group

Casey McCormick, *Head of Global Innovation*, SweeGen

Ahmad Alwan, *Deputy CEO*, Hub71

Dr Arshi Ayub Zaveri, *CEO*, Trust with Trade & Oxygenate Bamboo

Moderator: **Jamil Jaffar**, *Founder & Executive Director*, National Security Institute



16:00 – 16:20

FIRESIDE CHAT WITH DR ARSHI AYUB ZAVERI

Endeavours in the ‘Year of Sustainability’

H.H. Sheikh Mohamed bin Zayed Al Nahyan – President of the UAE and Ruler of Abu Dhabi – has declared 2023 as the ‘Year of Sustainability’. During this session, we sit down with the multi-award winning business professional Dr Arshi Ayub Zaveri to discuss her continued innovation, initiatives and partnerships for impact, exploring how to achieve sustainability goals using pragmatic yet simple and effective means.

Dr Arshi Ayub Zaveri, *CEO*, Trust with Trade & Oxygenate Bamboo

Interviewer: **Aylon Morley**, *Next-Gen & Tech Investment Director - SFO*, Wentworth Hall

16:20 – 16:30

CLOSING REMARKS

Fatima Al Jaber, *Board Member*, Al Jaber Group

16:30 – 19:30

Evening Gala Reception Hosted By Aldar Properties

DC Finance and Aldar Properties invite all attendees to attend a Gala reception taking place at Aldar Square, Yas Mall on Yas Island.

Transportation will be provided shortly following the closing remarks on Day 1 to and from Saadiyat Rotana Resort & Villas.

On arrival, attendees will receive a unique tour of the architectural achievements underpinning the building and enjoy refreshments and canopies during the evening gala reception.

CONFERENCE AGENDA | DAY 2

25th Jan 2023

08:30 – 08:55

Day 2 Forum Registration & Refreshments

08:55 – 09:00

DAY 2 WELCOMING REMARKS

Nicholaus Rohleder, *CIO*, Mid-America Holdings

09:00 – 09:15

KEYNOTE ADDRESS

H.E. Sameh Al Qubaisi, *Director – General Economic Affairs*, Abu Dhabi Department of Economic Development

09:15 – 10:00

CUSTODIANS OF THE FUTURE

Generational Outlooks on Family Policy, Entrepreneurship, Inclusion and Diversity of Opportunity


- Managing the symbiotic relationship between tradition and innovation
- Strengthening the family footprint beyond traditional sources of wealth
- Education, funding and engagement in the family firm
- Navigating the future as an individual and family custodian

Hani Kurbaj, *Vice Chairman*, Fala Group

Dr Ruchi Dana, *COO*, Duluth Medical Technologies Inc; *Partner*, Dana Group

Ziad Salloum, *Partner*, Salloum & Partners LLC

Moderator: **Aneel Khan**, *Founder*, 1821; *Orbital Director*, The Salon - Optima Orbits



10:00 – 10:15

FIRESIDE CHAT – PART A

A Traditional Investment Approach to Digital Assets

Aylon Morley – active family office investor in blockchain, digital assets and FinTech ecosystems – shares his thoughts on how DeFi and traditional finance can work together, alongside prolific innovator, Alex Davis. Together, they will be reflecting and analysing the events of this year, impact of volatility on markets and where they are seeing the best relative value within a rigorous risk control framework.

Aylon Morley, *Next-Gen & Tech Investment Director - SFO*,
Wentworth Hall

Alex Davis, *Founder*, Mavryk Finance

10:15 – 10:30

FIRESIDE CHAT – PART B


During this session, Dragonfly share their approaches to investment in digital assets drawing and blending decades of traditional investment management experience with tech-native blockchain expertise. Dragonfly takes the view that superior fundamentals and a sustainable competitive edge are crucial predictors of crypto protocol returns as they always have been when investing in the shares of younger companies

Pouneh Bligaard, *CEO*, Dragonfly Asset Management

Moderated by: **Aylon Morley**, *Next-Gen & Tech Investment Director - SFO*,
Wentworth Hall

10:30 – 10:50

Morning Refreshments & Coffee Break



10:50 – 11:05

ENHANCING INVESTMENTS WITH INNOVATIVE INSURANCE

Using Innovative Solutions to Minimize Taxes and Enhance the Returns on Global Investments

Many Non-U.S. Investors are reluctant to invest in the U.S. due to the high tax rates. Conventional tax blockers such as Leveraged Blockers and BDCs can be complicated, expensive to implement and still allow significant tax leakage. Proven insurance-based tax blockers are easier and less expensive to implement, while at the same time they can effectively eliminate any tax leakage. These more efficient insurance-based tax blockers can increase a Non-U.S. Investors' IRR on U.S. assets by over 60% and result in an additional return of 500 basis points as compared to a conventional blocker.

Thomas F. Wiese, *President of Institutional Solutions*, Crown Global Insurance Group LLC

11:05 – 11:20

BRIGHT-SPOTS IN MULTI-FAMILY REAL ESTATE

Investing in Multifamily Real Estate in 2023

David Tepperman, *Global Head, Capital Markets*, American Landmark Apartments

Ali Serrhini, *Managing Director of Capital Markets, MENA*, American Landmark Apartments

11:20 – 11:40

ENTREPRENEURIALISM & PHILANTHROPY

“Everything is Possible”

Paul Hutchinson, *Entrepreneur and Philanthropist; Founder*, Child Liberation Foundation; *Co-Founder*, Bridge Investment Group

11:40 – 12:10

NORTH AMERICAN FAMILY MEMBERS PANEL

Philosophy, Investment & Entrepreneurialism in a Multi-Generational Family Ecosystem

- Global entrepreneurial practices and growth
- The magic and mayhem in a multigenerational family ecosystem
- Leading a family enterprise through crisis and transformation
- Intergenerational communication, governance and continuity

Tina Naqvi-Rota, *CEO*, Cameron Corporation

Paul Hutchinson, *Entrepreneur and Philanthropist; Founder*, Child Liberation Foundation; *Co-Founder*, Bridge Investment Group

Moderator: **Nicholaus Rohleder**, *CIO*, Mid-America Holdings

12:10 – 13:10

Networking Lunch

13:10 – 13:55

IN CONVERSATION WITH CHERIE BLAIR, CBE KC & AWARD-WINNING FILM DIRECTOR, JOHN DEERY


“The Rock Pile”

Cherie Blair – Founder of The Cherie Blair Foundation for Women, lead for King’s Counsel, and wife of the former British Prime Minister, Tony Blair – discusses her role as the Executive Producer in the upcoming feature film, ‘The Rock Pile’. Together with award-winning film director and producer, John Deery, they will discuss the vision for this exciting project, the importance of the film to the Middle East and the opportunities it offers. The film will be produced with Hollywood producer Alexandra Milchan (‘TAR’ & ‘The Wolf of Wall Street’).

Cherie Blair CBE KC, *Executive Producer*, The Rock Pile; *Founder*, The Cherie Blair Foundation; *Leading* King’s Counsel

John Deery, Award-Winning British-Irish Film Director

Moderator: **Aylon Morley**, *Next-Gen & Tech Investment Director - SFO*, Wentworth Hall



13:55 – 14:25

LATAM FAMILY BUSINESS PANEL

Successful Business Successions Create Successful Business Dynasties

Joshua Vivar, *Principal*, BHYH Group

Kaushal Sheth, *CEO*, Deep Money

Moderator: **Hector Cateriano**, *Managing Partner*, MAS Equity Partners

14:25 – 14:40

ART: PASSION, PURPOSE, PHILANTHROPY

Passion Play – Passion Pay

A personal story and journey in the arts.

Abhishek Poddar, Business & Prominent Collector, Patron of the Arts

14:40 – 14:45

CHAIR'S SUMMARY AND CLOSING REMARKS

14:45 – 15:30

Final Networking