Campden Family Connect
Membership | Events | Research| Education | IPI
A Patni Family & Campden alliance

Monday, **11th December, 2023** Club Jolie's, Mumbai
Pre Forum Reception
(Exclusive for Campden members)

Tuesday, **12th December, 2023** Jio World Convention Centre, Mumbai
The 8th Indian Family Office Forum

Wednesday, **13th December, 2023** Jio World Convention Centre, Mumbai
Co-Investment Workshop
(Exclusive for Campden members)

100TH Family Gathering

THE 8TH INDIAN FAMILY OFFICE FORUM

Preserving Legacy & Prospering with Purpose

While the family offices are on the rise, it is essential for families to recognise and embrace the fundamental purpose and responsibilities of a single family office. The theme “Preserving Legacy & Prospering with Purpose” encapsulates the core essence of family offices – safeguarding the heritage and values of families while ensuring their wealth serves a meaningful purpose. The theme emphasises that family offices are not just wealth managers; they're guardians of legacies. The 8th edition of the flagship event, Indian Family Office Forum is a distinguished gathering of ultra-affluent family offices and business families in India. The forum highlights the importance of striking a balance between preserving wealth and nurturing a sense of purpose through discussions on climate investing, trust structures, outlook of family offices in India, evaluating Gift City structures and more.

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Institute for Private Investors

Campden Club

DR. RUCHI DANA
Partner & Board Member
Dana Group (UAE)

FORUM CHAIRPERSON

Ruchi, a 2nd generation family member, transitioned from a medical practitioner to an accomplished entrepreneur at Dana Group. She started the Value-added Steel manufacturing division, and established Lubricants, Grease, Retail, and Real Estate divisions at Dana Group in 2014. Her adept leadership steered the group through the 2008-2009 global recession. Currently, she's engaged in strategic planning and family office investments. Forbes Middle East recognized her as the "Next Generation Business Leader, Arab World" for three consecutive years (2017, 2018, 2019), and featured her in Forbes ME Top Power Businesswomen 2020. She holds an MD from AMU, MBA from Stanford University, and a PMP Certificate in Public Management and Social Innovation from Stanford.

FEATURED SESSIONS

EXPLORING SECURE PRIVATE CREDIT INVESTMENTS IN INDIA'S GROWING REAL ESTATE MARKET

The private credit market in India has gained popularity in recent years. Over the last few years, the market has seen over USD 15 billion in private credit transactions, with real estate being a significant portion of it. The Indian real estate market has experienced an upcycle, driven by factors like increased affordability, rising salaries, and reasonable mortgage rates. And this trend is expected to continue for the next few years. In this session, we deep dive into the dynamics of private credit in the real estate space as well as the various opportunities in which institutional investors have made significant investments and should also be explored by Family Offices and Ultra-High-Net-Worth Individuals (UHNWIs).

Ashish Khandelia, Founder, Certus Capital and **Earnnest.me**

OUTLOOK FOR FAMILY OFFICES IN INDIA

In recent years, there has been a rise in the number of families establishing single family offices in India. It is important for families to understand how their family office will mature in the long run and sustain its core essence and purpose. The session will dissect the intricacies of restructuring and whether family offices remain the sole domain of a single leader or if they are increasingly equipped to establish robust systems that safeguard family wealth and legacy across generations. Our panellists will engage in a candid conversation about the core purpose of family offices, discuss their practices and discuss how they are preparing to evolve the family office structure with changing times.

Moderator: Nitesh Aggarwal, CIO, **Baldota Family Office**
Kunal Mehta, Head – Family Office, **Dalmia Bharat Family Office**
Sagar Tanna, CIO, **Alchemie Ventures**
Siddharth Kothari, Chief Investment Strategist, **Om Kothari Group**

OPPORTUNITIES IN HIGH-GRADE PERFORMING CREDIT

This session will explore the often overlooked and dynamically growing segment of Performing Credit. Seasoned expert, will delve into the intricacies of this asset class, providing valuable insights for family offices and large private investors to capitalise on its potential. The discussion will focus on:

- What is high-grade Performing Credit
- The size of the investment opportunity in the space Why
- do entities which are bank-funded borrow from AIFs.
- How is the risk-return spectrum in this space

Vineet Sukumar, Founder & MD**, Vivriti Asset Management**

UNDERSTANDING FAMILY OFFICE STRATEGIES IN GIFT CITY: BALANCING PROS, CONS, AND OPPORTUNITIES

Within the context of GIFT City's increasing relevance for family offices, this session aims to comprehensively address its multifaceted aspects. This session will provide a balanced exploration of strategies within GIFT City, highlighting its unique advantages, regulatory nuances, and potential areas of concern. This session will also analyse GIFT City's role in enabling global diversification, optimizing remittance schemes, and leveraging tax incentives. By fostering a comprehensive and neutral dialogue, families will gain a clear understanding of GIFT City and its potential for shaping family office strategies.

Sandip Shah, Head - IFSC Department, **GIFT City**

DECODING INDIA'S INDUSTRY: OPPORTUNITIES, VALUATIONS AND BEHAVIOR PITFALLS – A Q&A FOR THE BOLD INVESTORS

Delve into a nuanced comparison of today's industry trends with past cycle, focusing on what's fundamentally solid versus just narrative. Gain a clear understanding of the risks and rewards in today's economic landscape. This interactive session aims to help families thrive in India's dynamic industrial investment landscape by providing practical insights into discovering strategies to capitalize on emerging opportunities, evaluating precise valuations, and navigating potential behavior pitfalls.

Charanjit Singh, VP - Equity Investments & Fund Manager, **DSP Asset Managers**

Kalpen Parekh, MD & CEO, **DSP Asset Managers**

BUILDING A LEGACY THROUGH PHILANTHROPY: THE UNTAPPED FAMILY ASSET

Philanthropic portfolio is an asset with the power to give increasing social returns while establishing a legacy embodying family value that can outlast generations. It is a positive force in which the family comes together to contribute to the social welfare of the nation. EdelGive Foundation has been a Philanthropic Asset Manager and Advisor for over a decade and truly believes in the power of purposeful philanthropy that business families can unleash.

Naghma Mulla, CEO, **EdelGive Foundation**

CLIMATE INVESTING: NURTURING A SUSTAINABLE LEGACY

In alignment with the global commitment to combat climate change and global warming, India has pledged to achieve net-zero emissions in the foreseeable future. To realize this visionary goal, it is imperative to mobilize resources from both the public and private sectors. This backdrop presents a significant opportunity for the private sector to invest in sustainability and climate-friendly businesses and practices. Business families can not only adapt these principles to their businesses but also diversify their portfolios by investing in this sector. Members from the prominent business families will delve into the conversation to discuss the landscape of climate investing in India, their strategies and how family offices can explore opportunities in this space.

Moderator: Ranjna Khanna, Director, **Impact Investors Council**
Harish Yarlagadda, Founder, **Malaxmi group,** Co-founder, **Dharmavana Nature Ark**
Priya Shah, Director, **RVS Family Office** & founder,**Theia Ventures**

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THEMATIC ROUND TABLE DISCUSSIONS

FAMILY WEALTH PRESERVATION THROUGH TRUST STRUCTURES

Trust structures play a vital role in family offices, providing a framework for managing and preserving wealth, ensuring confidentiality, and facilitating smooth intergenerational wealth transfer. Understand how peer families are implementing trust structures within family offices and gain insights into establishing effective trust frameworks for your own family office.

MANAGING LIQUIDITY FOR WEALTHY FAMILIES

In an environment of volatile public markets and increasing inflation, family offices encounter a unique challenge: how to manage their portfolios to ensure they have both the liquidity required for day-to-day expenses and the flexibility to seize new investment opportunities. Understand how peer families are optimizing their portfolios to generate sufficient cash flow while managing risk to mitigate lower returns.

CO INVESTMENT WORKSHOP

13th December, Jio World Convention Centre, Mumbai
(Exclusively for Campden Members)

We host the Co-investment Workshop on 13th December in Mumbai. The workshop brings together families, to discuss innovations, trends and challenges around direct & co-investing and we hear member backed deal opportunities for consideration.

The workshop provides:

- Peer to peer connectivity and information exchange with like-minded investors
- Discreet access to off-market, cross border, proprietary deal flow
- Best practice education on direct and co-investing

REASONS TO ATTEND

1. Adapt and evolve family offices for enduring wealth and purpose
2. Understand wealth preservation through effective family office trust structures
3. Discover methods for effectively managing liquidity in family office portfolios
4. Engage in candid, confidential discussions on key family office matters
5. Explore opportunities for diversifying your investment portfolio
6. Gain valuable strategic insights to enhance decision-making for family offices

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THEMATIC NETWORKING ROUND TABLES

Tailor your meeting experience by attending a thematic roundtable. One of the new innovations for the Campden Family Connect's forums is an hour-long thematic networking session. Each provides the opportunity to choose a micro subject to share your knowledge and experiences, gain insight and seek guidance from your fellow community members.

PRE FORUM RECEPTION

An exclusive members-only evening, a pre cursor to the Indian Family Office Forum, this gathering offers members the opportunity to interact with peers in a relaxed and enjoyable setting and unwind before the forum.

YOUR FAMILY IS INVITED TO JOIN THE FORUM TO ENHANCE THEIR CONTENT EXPERIENCE, EXPLORE BEST PRACTICES FOR EFFICIENT FAMILY OFFICE OPERATIONS, AND IMPROVE COMMUNICATION.

CAMPDEN FAMILY CONNECT MEMBERSHIP

Campden Family Connect is the pre-eminent wealth membership network for multi-generational business owning families, families of substantial wealth and their family offices. By joining the Campden Club, you become part of our global community of over, 1400 ultra-high net worth family members and their family offices, from over 39 countries. This is a private, qualified, invitation only, family member network.

Campden Family Connect Membership provides networking opportunities and unrivalled support to families, their next generation and senior executives through global and regional family wealth event, online communication with members around the world, Co-investment Workshops & Masterclasses, Women & Wealth/ NXG programs, member profiling, bespoke introduction & connections around aligned objectives, proprietary research report & data intelligence.

REGISTRATION

For further information and to register your interest in Membership, please write to us at

info@campdenfamilyconnect.com

PARTNERS

DSP MUTUAL FUND

Vivriti Asset Management

EdelGive Foundation — An Edelweiss Initiative

SUPPORTING PARTNER

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