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

12th December 2024
Co-Investment Workshop & Pre-Forum Reception
(exclusively for Campden members)
The Bay Club, Mumbai

13th December 2024
Main Forum
Legacy Room, The St. Regis Mumbai

THE 9TH INDIAN FAMILY OFFICE FORUM

Building Tomorrow, Today: Vision, Strategy, Growth

The theme "Building Tomorrow, Today: Vision, Strategy, Growth" emphasizes the crucial role of family offices in proactively shaping their future through strategic foresight and dynamic execution. It signifies the importance of making deliberate, well-informed decisions today to lay the foundations for sustainable growth and success. By leveraging a clear vision, robust strategies, and a commitment to innovation, family offices can navigate an evolving landscape and seize opportunities that ensure long-term prosperity. Discussions will explore topics such as portfolio construction, talent management, luxury asset investments, and family cohesion—equipping participants to turn today's actions into tomorrow's achievements.

Campden Wealth
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Institute for Private Investors

Campden Club

FORUM CHAIRPERSON

AMIT PATNI

DIRECTOR

RAAY GLOBAL INVESTMENTS &

CAMPDEN FAMILY CONNECT

A 3rd generation member of the Patni Family - founders of Patni Computers and pioneers in establishing Family Offices as early as 2000s. Much of Amit's time is spent in meeting families of wealth, and advocating the importance & purpose of family offices. Post the sale of Patni Computers, he setup his own single family office, Raay Global Investments with a detailed system, including extensive investment processes from trust and estate planning to philanthropy and more. He also spearheads Campden Family Connect's business in India, focusing on the growth and strategy of the firm in the country. He is a MBA graduate from Babson College, Boston, USA. He is co-founder of Nirvana Venture Advisors, Elysium Investment Advisors, and The Hive-India, and director at Waterfield Advisors.

SOME OF THE FEATURED SPEAKERS

Pearl Agarwal
Founder and Managing Partner
Eximius Ventures

Co-Investment Workshop Chairperson

Amol Sathe
CIO
Thermax Family Office

Round Table Chairperson

Seema Arora Nambiar
CEO
Shubhan Ventures

Round Table Chairperson

Abhishek Singh
VP & Fund Manager
DSP Mutual Fund

Anil Gudibande
Co-Founder
1Crowd

Gurpreet Brar
Managing Director
Edelman

Manishankar Mandal
CIO
Alembic Group Family Office

Puneet Jain
CIO
Karan Thapar Family Office

Shrishti Sahu
Managing Partner
Swadharma Source Ventures

Rubin Chheda
Managing Director
Neo Asset Management Pvt Ltd

KEY DISCUSSIONS

MASTERING THE ART OF PORTFOLIO CONSTRUCTION AND SELECTING THE RIGHT INVESTMENT MANAGERS

In the complex world of wealth management, constructing a resilient family investment portfolio is both an art and a science. This session will explore how family office builds a balanced portfolio covering critical aspects such as diversification, direct investing, alternatives, high-risk assets and aligning all with the family goals and needs. This session also discusses best practices for selecting investment managers—those who not only align with the family's financial objectives but also bring the expertise needed to navigate volatile markets.

THE MISSING BILLIONAIRES: LESSONS IN SUSTAINING WEALTH & AVOIDING COSTLY MISTAKES

Massive advantages like network, wealth, and ambition often fall short of delivering expected investing outcomes. This discussion uncovers common missteps that undermine potential and actionable strategies to turn these advantages into sustainable wealth.

BUILDING AND RETAINING THE DREAM TEAM

As Indian family offices grow more sophisticated, the need for specialized talent is driving a hiring surge, particularly in roles such as Chief Investment Officers (CIOs), analysts, and legal experts. This session explores the strategic importance of assembling the right team to manage complex portfolios, navigate regulatory landscapes, and drive innovation. This session focuses on the key skills and expertise that family offices are seeking, the challenges of attracting top talent in a competitive market, and how family offices can build a cohesive team that aligns with their long-term vision. This session is crucial for principals looking to future-proof their family office by investing in human capital.

HOW TO STRATEGIZE START-UP INVESTING FOR INDIAN FAMILY OFFICES

This session focuses on how Indian family offices can succeed in start-up investing by building a diversified portfolio across sectors and stages to balance risk and maximize returns. By strategically backing the strongest performers within this portfolio, they can drive sustainable growth, capture innovation, and build a resilient investment approach in the evolving start-up landscape. Attendees will gain insights on how to craft a resilient investment approach that aligns with the dynamic nature of the Indian start-up landscape, empowering them to make informed, high-impact investment decisions.

DEMYSTIFYING SPECIAL SITUATIONS CREDIT

An asset class with equity-like returns and debt-like safety that delivers superior risk-adjusted yields and addresses clients' evolving regular income needs.
Private credit is booming in India, with Special Situations financing offering attractive risk-adjusted returns within this segment. Historically focused on OTS, NPA pool purchases, and secondary bonds, India's credit market is now maturing, creating new opportunities. Tailored credit solutions for mid-market companies—supporting growth, capital structure corrections, shareholder reorganizations, PE exits, and last-mile financing—are driving significant deployment opportunities. This session will highlight key strategies and emerging opportunities in Special Situations Credit, equipping attendees with actionable insights to harness this asset class's potential.

THE STRATEGIC APPROACH TO ART & LUXURY INVESTMENT IN MODERN TIMES

As the markets for art, luxury goods, and collectibles continue to evolve, the approach to investing in these assets must be both strategic and informed by current trends. This session will explore how collectors can blend personal passion with a keen investment strategy to navigate the complexities of today's market. We'll examine the dynamics of art acquisition, including the importance of provenance, market trends, and the long-term investment potential of artworks. Beyond art, we'll also delve into the world of luxury investments—such as watches, classic cars, and rare collectibles—discussing how these assets can play a crucial role in diversifying portfolios.

THEMATIC ROUND TABLE DISCUSSIONS

THE ROLE OF FAMILY COHESION IN WEALTH STEWARDSHIP

As families grow in wealth, the complexities of wealth transfer and the responsibilities that come with it can threaten the cohesion and legacy of the family. This roundtable discussion will focus on the strategies needed to strengthen family bonds and ensure that the values driving the family's success are passed on effectively. We'll explore practical tools such as family councils, charters, and structured education programs that prepare the next generation to manage wealth responsibly and navigate challenges.

DECODING FAMILY OFFICE FUNDAMENTALS

This peer-to-peer roundtable is crafted for family office principals and NextGens who are either establishing a family office or seeking to optimize their current operations. The discussion will focus on sharing best practices across key areas essential for the success and sustainability of family offices. Participants will delve into the core functions and objectives of a family office, explore various structural models, and discuss the pivotal role of family offices in comprehensive wealth management.

CO INVESTMENT WORKSHOP

We host the Co-investment Workshop on 12th 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

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

MAIN PARTNER

Edelman

PROFESSIONAL PARTNERS

DSP MUTUAL FUND

1crowd

neo ASSET MANAGEMENT

Campden Family Connect
10th Floor, AWFIS, Parinee Crescenzo, Bandra Kurla Complex
Mumbai, Maharashtra 400051
+ 91 (0) 22 - 66940176