

London
Business
School

Institute of
Entrepreneurship
and Private Capital

Schroders
Wealth Management

Family Office Service

Family Office Conference at LBS



25-26 February 2025

Agenda

Day 1, 25 February 2025, London

08:20	Registration North Building Reception and Bagri Hive	Registration and Breakfast
09:00	Welcome Nuffield Hall, North Building	Opening Remarks Florin Vasvari , Professor of Accounting; Academic Director of the Institute of Entrepreneurship and Private Capital, London Business School
09:10	Intro Nuffield Hall, North Building	Welcome Remarks from the Event Supporter Leonie Schroder , Non-Executive Director, Schroders
09:15	Fireside Chat Nuffield Hall, North Building	The Geopolitical Effect on Family Enterprise Global uncertainty continues to shape investment and succession planning. This discussion will offer expert insights into how geopolitical shifts are influencing family enterprises worldwide. Sir Niall Ferguson , Milbank Family Senior Fellow, Hoover Institution Sergei Guriev , Dean, London Business School
09:45	Session 1 Nuffield Hall, North Building	Transforming Family Office Portfolios As financial markets shift and global uncertainties reshape investment strategies, family offices must adapt to new paradigms in wealth management. This session will explore key trends, including the rise of passive investing with AI-driven optimization, evolving diversification strategies in a deglobalizing world, and the challenges of direct versus fund investing. Participants will also discuss the impact of AI on investment opportunities, the implications of the energy transition, and the best practices for family office collaboration and governance. Jeannine Daniel , CIO and Managing Director, Cara Advisory (UK) Limited Glenn Fuhrman , Co-Founder and Co-Managing Partner, Tru Arrow Richard Nourse , Founder and Managing Partner, Greencoat Capital Moderated by Florin Vasvari , Professor of Accounting; Academic Director of the Institute of Entrepreneurship and Private Capital, London Business School
10:30	Session 1 Nuffield Hall, North Building	Roundtable Discussion and Debrief

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11:00 **Coffee Break and Networking**
Bagri Hive

11:30	Session 2 Nuffield Hall, North Building	Emotional Capital and the Resilient Family Enterprise: How Families Use Emotional Ties to Ensure Longevity Strong emotional ties are a cornerstone of long-lasting family enterprises. This session explores how families cultivate unity among diverse shareholders, navigate relationship challenges, and leverage emotional cohesion to sustain success across generations. Through real-world insights and interactive discussions, participants will gain strategies to strengthen family bonds and ensure business longevity. Sophie Cuendet du Roy , Family Member and Family Office Managing Director Séverine Mulliez , Family and Board Member, Association Familiale Mulliez Giorgiana Notarbartolo , Family Member and Head of Impact Philanthropy, PFC Family Office Moderated by Åsa Björnberg , Executive Fellow, London Business School
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12:15	Session 2 Nuffield Hall, North Building	Roundtable Discussion and Debrief
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12:45 **Lunch**
Ratcliffe Building R0.10 Dining Room

14:00	Fireside Chat Nuffield Hall, North Building	Our Story: Leadership, Succession and Family Business as a Force for Good This fireside chat will explore Steve Rigby's journey within his family firm, Rigby Group, from its history to its current operations. The discussion will cover the dynamics of sharing the CEO role with his brother, the benefits and challenges of this structure, and strategies for ownership transitions across generations. It will also highlight his broader contributions to the sector through his work with the UK Private Business Commission and Family Business UK. Steve Rigby , Co-CEO, The Rigby Group Moderated by Rhian-Anwen Hamill , Managing Partner, RAH Partners Ltd
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Day 1, 25 February 2025, London

14:40	Keynote Nuffield Hall, North Building	CEO Succession in Family Businesses: The Performance Impact of Hiring a Family vs. Non-Family CEO This research talk will explore the performance effects of CEO transitions in family firms, comparing transitions from family to family versus family to non-family leadership. It will also examine the role of the top management team during these transitions and how it can help mitigate potential negative effects. Sendil Ethiraj , Professor of Strategy and Entrepreneurship; Deputy Dean, London Business School
15:10	Coffee Break and Networking Bagri Hive	
15:40	Session 3 Nuffield Hall, North Building	Cybersecurity and Managing Digital Risk As cyber threats become more sophisticated and the world grows increasingly interconnected, family offices and family businesses must take proactive measures to safeguard sensitive data, assets, and reputations. This session will feature an expert panel sharing real-life case studies, practical strategies, and best practices for mitigating both corporate and personal risks. From emerging cyber threats to regulatory considerations, the discussion will explore how to build true cyber resilience and minimize financial and reputational impact in the face of potential cyber incidents. Peter Connolly , Founder and CEO, Toro Solutions Steve Hill , Independent Board Risk Adviser, Former Group Chief Information Security Officer at Credit Suisse Edouard Thijssen , Co-Founder, Trusted Family Moderated by Ralph Welpé , Chairman and CEO, Mirai Capital Partners
16:20	Session 3 Nuffield Hall, North Building	Roundtable Discussion and Debrief
16:50	Day Debrief Nuffield Hall, North Building	Luisa Alemany , Associate Professor of Management Practice in Strategy and Entrepreneurship; Academic Director of the Institute of Entrepreneurship and Private Capital, London Business School
16:55	Networking Reception and Canapés Ratcliffe Building, R0.10 Dining Room	
18:30	End of Day	

Agenda

Day 2, 26 February 2025, London

08:30	Registration North Building Reception and Bagri Hive	Registration and Breakfast
09:00	Intro Nuffield Hall, North Building	Opening Remarks Luisa Alemany , Associate Professor of Management Practice in Strategy and Entrepreneurship; Academic Director of the Institute of Entrepreneurship and Private Capital, London Business School
09:05	Session 1 Nuffield Hall, North Building	Insights from the First Generation: Navigating Success, Scaling Challenges, and Securing Investment Hear from industry leaders as they share their experiences in building and scaling businesses, attracting investment, and sustaining long- term success. Hussein Kanji , Founder, Hoxton Ventures Anuj Srivastava , Founder and Chairman, Livspace Chitra Stern , CEO, Owner, Founding Board Member, Martinhal Family Hotels & Resorts, the United Lisbon International School, and the Edu Hub of Lisbon Moderated by Luisa Alemany , Associate Professor of Management Practice in Strategy and Entrepreneurship, London Business School
09:50	Intro Nuffield Hall, North Building	Introduction to the breakout sessions and room change

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10:00

Breakout Sessions

Four breakout sessions will run in parallel:

- **Opportunities and Threats for Family Businesses in Emerging Markets**

An opportunity for participants to consider and share insights on what's distinctive about FOBs in emerging and frontier markets, and the particular challenges for FOBs in emerging and frontier markets.

Facilitated by Rupert Merson,

Adjunct Professor of Strategy and Entrepreneurship, London Business School

- **The Succession Challenge: An Exchange of Experiences Between Participants**

Enterprising families face complex succession challenges across multiple levels—ownership, corporate governance, family dynamics, and leadership of the family office. In the first 100 years, spanning the first three generations, governance structures must evolve continuously to ensure smooth transitions.

Facilitated by Heinz-Peter Elstrodt,

Guest Lecturer, London Business School

- **Climate and Energy Transition Financing in a Shifting Global Landscape**

The world requires trillions in investment to curb CO₂ emissions and drive the energy transition, yet geopolitical uncertainty, shifting policies, and weakened climate commitments pose significant challenges. This panel will explore key financial levers to navigate these headwinds, including reducing technology costs through R&D incentives and economies of scale, mitigating systemic risks such as regulatory instability, and expanding blended finance to attract institutional investors. By addressing these barriers, the discussion will chart actionable pathways to safeguard and scale climate finance in an increasingly complex global landscape.

Facilitated by Narayan Naik, Professor of Finance, London Business School and

Sanmit Ahuja, Director, CETFI

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10:00	Breakout Sessions	<ul style="list-style-type: none">• Outsourcing Within the Family Office: Striking a Balance Between Control and Expertise <p>An interactive session to explore the functions a family office could outsource, considerations and challenges in building alignment, bringing balance and making the entity fit for purpose. An opportunity to share your perspectives, learn the best practices, and apply to your specific situation.</p> <p>Facilitated by Vidur Varma, Guest Lecturer, London Business School</p>
11:10	Coffee Break and Networking Bagri Hive	
11:40	Session 2 Nuffield Hall, North Building	<p>The Family Business Reimagined: How Families Are Designing Robust New Business Models for the Future</p> <p>This session will examine how a family business integrated sustainability into its core strategy and the benefits of adopting a long-term perspective. It will discuss the impact of this approach on business resilience, growth, and legacy, highlighting key lessons for family enterprises navigating an evolving landscape.</p> <p>Leif Høegh, Owner, Høegh Capital Partners</p> <p>Moderated by: Rhian-Anwen Hamill, Managing Partner, RAH Partners Ltd</p>
12:30	Closing Keynote Nuffield Hall, North Building	<p>Refining Expectations for Empowered CEOs</p> <p>Family businesses often expect their CEOs to maximize everything—profitability, growth, innovation, brand prestige, and employee engagement. Building on the insights of this conference, will you go back to your office with even more expectations? This session challenges that mindset, offering a fresh perspective on how family offices may guide CEOs for the success they desire. By refining priorities and making explicit the trade-offs that matter, family offices can empower CEOs to lead with the desired focus, confidence, and impact. Join this session to explore a novel approach to supporting the leaders driving your investments.</p> <p>François Ortalo-Magné, Professor of Management Practice in Economics, Strategy and Entrepreneurship; Executive Dean (External Relations), London Business School</p>
13:00	Lunch Ratcliffe Building R0.10 Dining Room	

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Day 2, 26 February 2025, London

14:15	End of the main conference
14:15	Family Office 101 by Schroders Ratcliffe Building R.01 Lecture Theatre LT1
15:45	Coffee Break and Networking Ratcliffe Building R0.10 Dining Room
16:30	End of Day



Speakers



Sanmit Ahuja

Director, CETFI



Sanmit Ahuja (LBS MBA 2004) is an environmental and sustainability expert specialising in building multi-stakeholder ecosystems, technology transfer, and green finance. He has developed over 30 projects in the water, waste, renewable energy, and agriculture sectors and serves on several government panels and boards including

the Ganga River Basin Management and Studies (cGanga). He is the Founding Director of CETFI, leading climate finance initiatives and collaborating with organisations such as the World Bank, Asian Development Bank, The Commonwealth, the EU and more.



Luisa Alemany

Associate Professor of Management Practice in Strategy and Entrepreneurship; Academic Director, Institute of Entrepreneurship and Private Capital, London Business School



Luisa Alemany is an Associate Professor of Management Practice and Academic Director of the Institute of Entrepreneurship and Private Capital at London Business School. She is a Fellow at St Hugh's College (U. Oxford). Her main areas of interest are Entrepreneurial Finance and Venture Philanthropy. She is a director on the board of the Newton Venture Programme and she sits on the Investment Committee of Oxfam's Enterprise Development Program and DeepTech VC fund Fond-ICO Next Tech in Spain. She is also part of

the Advisory Committee of FMO Ventures, the Dutch development fund. Her book, together with J. Andreoli, *Entrepreneurial Finance: The Art and Science of Growing Ventures* (Cambridge University Press, 2018), was the first European textbook on the topic and was awarded "Most Promising New Textbook" by TTA in 2021. She holds a PhD in Economics & Business from Universidad Complutense de Madrid (Spain) and an MBA from Stanford University (USA).



Åsa Björnberg

Lecturer and Executive Coach at London Business School, Family Business Expert



Åsa Björnberg is a clinical and organizational psychologist who has conducted family business research at London Business School (LBS), McKinsey & Company, and London School of Economics. She consults large family businesses in LatAm, Middle East, USA, Europe and Asia. Her work focuses on interpersonal aspects of governance and intergenerational transitions, acting as a midwife in the transformations of complex family business systems. She is typically asked to help with team building of sibling/cousin ownership groups, how to move from difficult to courageous conversations in various governance bodies, addressing family dynamics that block the evolution of the system, personal and leadership development of next generation and incumbent family members, as well as developing emotional intelligence and agility. As an executive coach, Åsa has coached over 700 leaders and family business members from 60 different countries in her career, both for LBS executive education and in private practice.

Alongside Prof Nicholson, Åsa ran the Family Business Culture and Leadership Initiative at LBS back in 2000 and has several publications on the topic. Subsequently she launched the first ever family business executive education programme at LBS. Åsa is also the original founder of the Family Business Club at the school. In addition to serving family business clients at McKinsey, she conducted a large family business research programme, which included interviewing the captains of industry across the globe, gaining first-hand insight into some of the biggest and best family businesses in the world. She also worked closely with the Head of Learning at McKinsey and is a strong advocate for experiential learning "learning by doing and feeling". In this vein, she works with horses to help people in her private practice (is a trained equine-facilitated psychotherapist) and runs nature immersion and executive replenishment retreats on her stunning nature reserve on the West Coast of Sweden.

Speakers



Peter Connolly

Founder and CEO, Trustee, Toro



Peter is a poacher turned gamekeeper; in 2015, he founded Toro after early careers in the UK military and corporate security. He created the UK's first Red Team penetration testing service by blending hacking with physical intrusion (burglary), and social engineering (tricking people). He then led teams to attack hundreds of businesses and find their security gaps.

Toro's team of cyber-physical security experts and investigators helps protect Family Offices, private clients, NGOs, and governments. They are leaders in the converged security revolution, defending by thinking like attackers.

Peter is also a Trustee of two UK military veteran charities and co-founded a non-profit called TechVets which supports around 200 veterans annually into careers in tech and cyber.



Sophie Cuendet du Roy

Family Member and Family Office Managing Director



Sophie Cuendet du Roy is a member of the fifth generation of a large Swiss enterprising family ecosystem and has first-hand experience in the complex world of family business. While some of the legacy businesses have disappeared or been sold, others remain actively managed by certain branches of her family. Following the sale of their closest family business, her generation embarked on a journey of deep transformation of their family culture, overcoming inherited family conflicts, taboos, and trauma that had long fuelled distrust and poor relationships. This shift led them to embrace an open, inclusive and collaborative approach, rekindling relationships and, in turn, fostering joint development and investment projects.

Sophie serves as an independent Board member to one of the largest European family enterprises. She also acts as a trusted partner for medium to

large family-owned companies and family offices, supporting them in their visioning, governance structuring, ownership strategy definition, and succession planning to stay ensure long-term sustainability. Building on her rich, diverse and international personal and business experience over the last 25 years, she has developed in-depth complementary skills, particularly in legal and governance expertise, strong business and strategic acumen, and a deep understanding of culture and relationships at leadership and ownership levels. In her work, she places particular emphasis on family culture and dynamics. She proposes tools and frameworks that enhance and develop open communication, collaborative skills, collective intelligence as well as conflict prevention/resolution to build a robust culture and sustain family business continuity.



Jeannine Daniel

CIO and Managing Director, Cara Advisory (UK) Limited



Jeannine Daniel is Managing Director, Cara Advisory Limited, a Private Investment Office that allocates globally across traditional and alternative assets including Hedge Funds, Specialty Finance, Private Equity Funds, Co-investments and Venture Capital. Jeannine is Head of the London Office, responsible for coordinating the Strategic direction of the investment program, hiring, Portfolio Management and Manager Selection. Jeannine has spent 20 years investing on a global basis. Prior to joining Cara in 2017 Jeannine was a Director, Head of Equity and Event Driven Strategies at Amundi where she was responsible for sourcing, selecting and monitoring managers for their Alternative Investment division.

In 2010 Jeannine joined Kedge Capital, the Family Office for the Bertarelli family as a Senior Hedge Fund advisor helping manage their \$5bn+ Hedge Fund investment programme. In 2004 she joined Ivy Asset Management, a large U.S. based Fund of Hedge Fund to help coordinate its European Investments. Jeannine also spent time at Barclays Global Investors (BGI) and JP Morgan having previously graduated with a bachelor's degree with honors in Finance at Royal Holloway, University of London. In addition, she has obtained the CAIA Charter. In 2015 Jeannine was awarded the Financial News 40 under 40 as part of the Rising Stars in the European Hedge Fund Industry.

Speakers



Heinz-Peter Elstrodt

Guest Lecturer, London Business School



Heinz-Peter Elstrodt is active as guest lecturer on family businesses at London Business School and INSEAD. He also acts as a board member of family firms and the Family Firm Institute (FFI). He is a Director Emeritus at McKinsey & Company.

After joining McKinsey in 1983, he worked in Germany, USA and Brazil, where he co-founded the São Paulo office in 1988. Between 2004 and 2011 he was responsible for the Latin American region. From 2011-2015 he built and led McKinsey's global Family Business practice, working with leading family businesses around the world, conducting research and collaborating with key conveners like the WEF. Heinz-Peter has also worked and published extensively on themes of Brazilian and LATAM economic development.

After his retirement from McKinsey in 2015, he took up residence in London and has dedicated himself to teaching, board memberships and advising in

the field of family firms and to impact investing in the area of agriculture, sustainable finance and environmental technology.

Heinz-Peter earned a Dr. rer. pol. in Economics from the University of Augsburg, Germany (1982), and a degree in Business Administration and Industrial Engineering from the University of Karlsruhe, Germany (1979).

His publications include: "The five attributes of enduring family businesses", "A succession memo to a family business founder", "Building a house that lasts: a framework to guide the succession from few owners to many", "The family business factor in emerging markets", "What executives are asking about Latin America", "How Brazil can grow", "Reconnecting Brazil to the World", "Five Priorities for Brazil's Economy", "Reining in Brazil's informal economy", "Helping nonprofits do business" and "Keeping the family in business".



Sendil Ethiraj

Professor of Strategy and Entrepreneurship; Deputy Dean (Faculty), London Business School

Dr. Ethiraj, originally from India, received his PhD in Management from The Wharton School, University of Pennsylvania and served on the faculty at Ross School of Business, University of Michigan for over a decade before joining London Business School.

His teaching and research interests span core topics in strategic management including innovation,

competitive strategy, and managing human capital.

A member of the Governing Body since 2022, Dr. Ethiraj is deeply committed to furthering the research and teaching excellence of faculty at LBS. His primary focus is on designing structures and reward systems to attract and retain the best and diverse research faculty from all over the world.



Sir Niall Ferguson

Milbank Family Senior Fellow, Hoover Institution



Sir Niall Ferguson, MA, DPhil, FRSE, is the Milbank Family Senior Fellow at the Hoover Institution, Stanford University, and a senior faculty fellow of the Belfer Center for Science and International Affairs at Harvard. He is the author of 16 books, including *The Pity of War*, *The House of Rothschild*, *Empire*, *Civilization and Kissinger, 1923-1968: The Idealist*, which won the Council on Foreign Relations Arthur Ross Prize. He is an award-winning filmmaker, too, having received an international Emmy for his PBS series *The Ascent of Money*. His 2018 book, *The Square and the Tower*, was a New York Times bestseller and was also adapted for television by

PBS as Niall Ferguson's *Networld*. Between 2020 and 2024 he was a Bloomberg Opinion columnist, before joining The Free Press. In addition, he is the founder and managing director of Greenmantle, a New York-based advisory firm, a co-founder of the Latin American fintech company Ualá, and a co-founding trustee of the new University of Austin. His latest book, *Doom: The Politics of Catastrophe*, was published in 2021 by Penguin and was shortlisted for the Lionel Gelber Prize. He is currently writing *Kissinger, 1969-2023: The Player* and serving as a visiting professor at the London School of Economics.

Speakers



Glenn Fuhrman

Co-Founder and Co-Managing Partner, Tru Arrow



Glenn Fuhrman is a Co-Founder and Co-Managing Partner of Tru Arrow Partners, an investment partnership based in New York, formed specifically to partner with investing families from around the world. The firm has 2 areas of focus, investing in Real Estate, primarily in retail shopping centers in regional US markets, as well as investing in Private Growth Technology Companies. Prior to launching Tru Arrow Partners, he co-founded MSD Capital, L.P. ("MSD"), the private investment firm for Michael Dell, the founder and CEO of Dell Technologies, serving as its Co-Managing Partner for over 20 years. Previously, Glenn was a Managing Director and Head of the Special Investments Group at Goldman, Sachs & Co.

Glenn is a Trustee of New York-Presbyterian Hospital, The Museum of Modern Art in New York,

and The TATE Americas Foundation. He is also a Board Member of The Institute of Contemporary Art in Philadelphia, the 92nd Street Y, the Federal Enforcement Homeland Security Foundation, The Central Park Conservancy, Gagosian Gallery, and The Spence School. In 2007, Glenn founded The FLAG Art Foundation in New York as an independent exhibition space open to the public.

Glenn lives in NY with his wife and 3 young children and is very active in Philanthropy, primarily through The Fuhrman Family Foundation.

He received his Master of Business Administration in 1988 from the Wharton School of the University of Pennsylvania, where he studied Finance and Art History and received a Bachelor of Science and Economics, summa cum laude, in 1987.



Sergei Guriev

Dean, London Business School



Sergei Guriev is the tenth Dean of London Business School, a position he has held since August 2024. As Chief Executive Officer of the School, he is implementing a plan to fulfil a vision of LBS as an engaged community walking the learning journey together.

With a faculty recognised for its world-class academic research and a School community rich in diversity, LBS advances careers, transforms organisations and shapes policy. Its London and Dubai campuses are at the hub of a prestigious global network inspired by their own stories of life-changing impact.

Dean Guriev is a Research Fellow at the Centre for Economic Policy Research (CEPR), London. He is a Senior Member of the Institut Universitaire de France, an Ordinary Member of Academia Europaea,

and an Honorary Foreign Member of the American Economic Association. He is also a Global Member of the Trilateral Commission. In 2006, he was selected a Young Global Leader by the World Economic Forum.

Prior to his appointment, Dean Guriev visited the Department of Economics at MIT on a post-doctoral fellowship and received a degree of Doctor of Science in Economics from the Russian Academy of Sciences. He was a Visiting Assistant Professor at the Department of Economics at Princeton University. He has also served as Professor of Economics and Rector at the New Economic School (NES) in Moscow, Professor of Economics and Provost at Sciences Po, Paris, and Chief Economist at the European Bank for Reconstruction and Development.

Speakers



Rhian-Anwen Hamill

Business Coach and Leadership Advisor



Rhian works in leadership advisory and business coaching with management teams and family groups. She is an experienced advisor on people and their work, helping organisations address strategy, culture, leadership, team and board effectiveness, succession, and talent development. Clients come from a wide range of businesses with a particular focus on family enterprises. Generally, they are individuals and teams at pivotal points in their evolution who want a safe – but not insipid – place to reflect, receive feedback and be pushed to think more deeply.

She holds and facilitates honest, enjoyable, often powerful, incisive, goal-oriented conversations on topics that concern people – new roles, conflicts, succession, transition, handling change, identifying a sense of purpose, retirement, balancing demands, team dynamics, trust, and psychological safety.

After graduating from UWC Atlantic College (International Baccalaureate) and Fitzwilliam College, Cambridge (MA Cantab English), Rhian worked for many years in two US investment banks (Goldman Sachs, Salomon Brothers), leaving to be the project director of a major national arts project in her native Wales (The Wales Millennium Centre). She then held senior positions for twenty years in talent acquisition with two global executive search firms (Whitehead Mann, The Rose Partnership) and eventually built and ran her own leading firm (RAH Partners). She is a qualified Executive Coach with Meyler Campbell, The Tavistock Institute, and the Kets de Vries Institute. She is also a Director of Cool Bananas, a Zambia-based family agri-business and lives in West London with her husband Michael and two children.



Steve Hill

Independent Board Risk Adviser, Former Group Chief Information Security Officer at Credit Suisse



Steve Hill is an independent senior risk adviser, helping corporate boards and individual clients navigate geopolitical risks, national security, and cybersecurity/resilience challenges. Steve served in the UK Government for over three decades in a variety of National Security roles countering transnational threats such as terrorism, espionage and proliferation. In 2017, he was appointed to the National Security Secretariat of the UK

Cabinet Office, with responsibility for aspects of cybersecurity policy. Subsequently, Steve served in a series of senior executive roles at Credit Suisse including Global Head of Technology, Cyber and Third Party Risk, Head of Operational Resilience, and Group Chief Information Security Officer. Steve is a Senior Visiting Research Fellow at King's College, London, and a member of the Dell Technologies Global Security Advisory Board.

Speakers



Leif Høegh

Owner, Høegh Capital Partners



Leif O Høegh has served as Deputy Chairman of the Board of Høegh LNG since 2006. He is a member of the company's audit committee. Leif is also the chairman of Høegh Autoliners Holdings AS and Høegh Eiendom Holdings AS. Leif worked for

McKinsey & Company and the Royal Bank of Canada Group. He holds an MA in Economics from the University of Cambridge and an MBA from Harvard Business School. Leif is a Norwegian citizen and resides in Norway.



Hussein Kanji

Founder, Hoxton Ventures



A proud New Yorker, Hussein is widely recognized as one of Europe's most influential tech investors, appearing on Forbes' Midas List Europe in 2023. His career spans senior roles at Microsoft and over

a decade in Silicon Valley's startup ecosystem. He holds an MBA from London Business School and an undergraduate degree in Symbolic Systems from Stanford University.



François Ortalo-Magné

Professor of Management Practice in Economics and Strategy and Entrepreneurship;
Executive Dean (External Relations), London Business School



François Ortalo-Magné was the ninth Dean of London Business School, serving from August 2017 to August 2024. As Chief Executive Officer of the School, he implemented a vision of LBS as an engaged community walking the learning journey together.

Ortalo-Magné serves on the board of directors of the Graduate Management Admission Council and the International Advisory Board of BritishAmerican Business. His research on the economics of land and housing markets has been published in leading

academic journals, and he has advised private, governmental and multilateral organisations worldwide.

Ortalo-Magné was the Albert O. Nicholas Dean and Robert E. Wangard Professor of Real Estate at the Wisconsin School of Business. He grew up in France, in the Pyrénées and on the family farm in the Lot Valley, before training as an agricultural engineer. He holds a PhD in Economics from the University of Minnesota, and his first academic appointment was at the London School of Economics.

Speakers



Rupert Merson

Adjunct Professor of Strategy and Entrepreneurship, London Business School



Rupert Merson is a leading authority on owner-managed, entrepreneurial and family businesses and the problems they confront as they seek to grow. He has worked as a consultant and facilitator for clients on a broad range of issues including formation, governance, strategy, ownership, remuneration, succession, turnaround and organisation development.

As an advisor, Rupert was a partner in BDO Stoy Hayward in London from 1993 to 2009. He now leads his own firm of advisers. He has completed assignments for businesses in the UK, US, South East Asia, South America, Africa and the Middle East and worked extensively with entrepreneurs, family businesses and professional partnerships. Rupert Merson is also an experienced non-executive director and board chairman.

As Adjunct Professor of Strategy and Entrepreneurship, Rupert currently teaches a range of MBA electives on owner management, entrepreneurship, family business and corporate turnaround, and frequently teaches on executive education programmes on strategy and

organisational development. Rupert was awarded the Best Teacher Award by the MBA class of 2015 at LBS. In the same year he was also awarded the prize for the best elective at INSEAD. In 2018 Rupert was awarded the Best Teacher Award by the MBA class for a second time.

Rupert has published a series of books on key management roles in the growing business, has co-authored a book on family businesses and writes frequently in the national press on related topics. His most recent book, *Growing a Business: Strategies for Leaders and Entrepreneurs*, was published by The Economist in 2015. He has spoken at conferences in Europe, America and Australasia. He is a Fellow of the Institute of Chartered Accountants of England and Wales, the Royal Society for the Encouragement of the Arts, Manufactures and Commerce, and the Chartered Institute of Personnel and Development. A first-class honours graduate and university prize-winner from Oxford University, he also holds a certificate in general management from Harvard Business School. In his spare time Rupert is a musician, conducting a choir and playing the organ, piano and harpsichord.



Séverine Mulliez

Family and Board Member, Association Familiale Mulliez



Séverine is one of the 1,650 family living members of the AFM, a family association of shareholder descendants of Louis Mulliez and Marguerite Lestienne and their spouses, freely and voluntarily engaged, responsible and united since 1955 around a common Mission, values, and successive visions.

Séverine has built a successful career across two complementary fields: operational and non-operational roles. In her operational responsibilities as controller, manager and later an executive, she has held key positions in companies of all sizes, from 200 to over 10,000 employees. This experience has given her a solid understanding of the inner workings of organizations and the day-to-day challenges they face.

Concurrently, she has held board positions, mainly on an international scale, across various sectors, including retail, personal services, and commercial

real estate.

This dual role has enabled her to acquire a holistic perspective on companies, understanding both concrete operational challenges and long-term strategic considerations.

Séverine sees her career path as an opportunity for continuous learning. Today, with her strong entrepreneurial culture, she devotes her time to her role as Supervisor on the Supervisory Board of the Mulliez Family Association, as well as to supporting entrepreneurial families in France and abroad in matters of governance, entrepreneurship, succession, and NextGen integration. She offers guidance, drawing on over 30 years of experience as a partner, shareholder, and board member of a family-owned multinational that has been in existence for over a century.

Speakers



Narayan Naik

Professor of Finance, London Business School



Professor Narayan Naik is recognized as one of the leading experts on hedge fund investing. Over the last decade he has authored a significant body of work in hedge funds benchmarking, performance evaluation of long-only managers, tail-risk hedging, life settlements-longevity risk and market microstructure. His work has appeared in the top finance journals, leading practitioner journals and financial press. Professor Naik's teaching includes the following subjects: Strategic Investment Management, Equity Investment Management and Hedge Funds.

Since joining London Business School (LBS) in 1991, Professor Naik has played a key role in the development of the finance group at LBS, most notably in the role of Director of the PhD Programme in Finance, Director of the School's Investment Management Programme, Director of the Hedge Fund Research Centre and more recently, one of the Academic Directors of the AQR Asset Management Institute at LBS.

Professor Naik has designed, and taught tailor-made courses in corporate finance, investment

management, Islamic Finance and hedge funds for investment banks and financial institutions. His most recent innovation has been the creation of FinTech and the Financial Services Industry Transformation elective. This course examines innovative technology-driven transformation of old business models in the financial services sector. Professor Naik's research interests also lie within this field, exploring how Financial Technology is breaking the financial services value chain through more efficient provisioning of Payments, Deposits and Lending, Capital Raising, Wealth Management, Insurance, Market Data Analytics, as well as the impact on businesses on by the Blockchain and Cryptocurrency technology.

Professor Naik has appeared many times on CNN, CNBC, Bloomberg, the BBC, ITV and other news channels as an expert finance academic. He has consulted widely during his career for the World Bank, sovereign wealth funds in the Middle East, and private corporations in the UK, USA, Middle East and Far East.



Giorgiana Notarbartolo

Head of Impact and Philanthropy, PCS Family Office



Gio is a wealth inheritor advocating for positive impact and systems change. She is the Head of Impact & Philanthropy at her Family Office Partners For Change, manages her portfolio, founded the venture competition 2030 Social Impact (which aims to contribute to the development of impact investing in her mother country Italy), advocates

for other wealth owners & financial institutions to deploy capital for positive impact and works on the redistribution of her wealth to help promote a more equitable society through fairer tax systems. Gio has a BA from Bocconi University, an MBA from INSEAD, is a mother, and is passionate about furthering her personal and professional growth.



Richard Nourse

Founder and Managing Partner, Greencoat Capital



Richard is the founding partner of Schroders Greencoat and leads the overall investment strategy of the firm, with a focus on private markets. Richard is a member of Schroders Greencoat's Management Committee.

Prior to founding Greencoat Capital in 2009, Richard enjoyed a long career in the city, first at Morgan Grenfell & Co. and then at Merrill Lynch, where he

led the EMEA Energy and Power Team, one of the leading renewable advisers in Europe.

After leaving Merrill Lynch in 2007, Richard joined the Shareholder Executive, part of the UK Government, with responsibility for British Energy, British Nuclear Fuels and Urenco.

Richard holds a BA in Geology from the University of Oxford.

Speakers



Steve Rigby

Co-CEO, The Rigby Group



Steve is Co-Chief Executive of Rigby Group plc, a technology-focused multi-generational family business. It is a top ten UK wholly family-owned business, with a turnover of almost £4 billion and employing 9,000 people. Working across the Group's diverse portfolio, Steve is responsible for leading strategy, finance and investments for the family in both the private and public markets. Outside of Rigby Group, Steve is a regular media commentator. He is on the Board of Family Business UK (FBUK), and Chair of the UK's Private Business Commission, launched to investigate how to help more

companies maximise their growth potential within the UK. He is also a patron of the Entrepreneurs Network, Chair of the Rigby Foundation, and a long-term supporter of Place2Be, most recently as Chair of the charity's development board. Within Rigby Group, Steve sits on the boards of SCC, Rigby Technology Investments, Regional & City Airports, Rigby Real Estate, the Group's hotel division, Nuvias Unified Communications, CloudClevr, Infinigate and Rigby Group. Steve is a keen sportsman, enjoying sailing, polo and tennis.



Leonie Schroder

Non - Executive Director, Schroders

Leonie Schroder is a member of the Schroder family and a non-executive board member of Schroders plc, one of Europe's largest asset management companies with £773 billion AuM as of 30 June 2024. She has held a number of roles in the charity sector and is currently a director of the Schroder Charity Trust as well as a number of private limited companies. Leonie is a descendant of John Henry Schroder, who co-founded the Schroders business in 1804. She is a graduate of the University of St. Andrews, has three children and has a keen interest in sustainability and conservation.

The breadth of Schroders investment capability gives it unparalleled insights across industries. The business is characterised by strong investment performance as well as its focus on social and environmental impact.

Schroders' founding family are still the company's largest shareholder, owning approximately 43% of the shares. Schroders has continued to deliver strong financial results despite recent market volatility. It has a market capitalisation of circa £7.7 billion and

employs approximately 6,000 people across 38 locations.

Schroders benefits from the most diverse business model of any UK asset manager by geography, asset class and client type. The firm offers innovative products and solutions across their five business areas of solutions; institutional; mutual funds; private assets & alternatives; and wealth management.

The firm's wealth management offering reflects its strategic ambition to provide wealth management and financial planning services to clients across the wealth spectrum.

Schroders' purpose is to provide excellent investment performance to clients through active management. It has three key, long-term strategic aims: to grow its asset management business, build closer relationships with end clients and expand its private assets and alternatives business. The business channels capital into sustainable and durable businesses to accelerate positive change in the world.

Speakers



Anuj Srivastava

Founder and Chairman, Livspace



Anuj Srivastava is an entrepreneur and an active angel investor. He is the Founder & CEO of Livspace, a Unicorn, and emerging Asia's largest and most trusted home interiors and renovations platform. He is also an investor - directly and through multiple venture funds - in over 150 companies and 10 unicorns across India, Southeast Asia, the USA and Europe.

Before founding Livspace, Anuj worked at Google's global HQ in Mountain View, where he led worldwide product marketing and growth functions for the e-Commerce, Shopping and Mobile Payments

teams, Google local/ maps and online ad products such as AdSense.

Anuj has a Bachelor of Technology from the Indian Institute of Technology, Kanpur and an MBA from the London Business School where he received the prestigious "Accomplished Entrepreneurs' Award" in 2020. He is passionate about giving back to the community and has lived and worked across India, the USA, UK and Singapore.



Chitra Stern

Owner and Founding Board Member, Martinhal Family Hotels & Resorts, United Lisbon International School and the Edu Hub of Lisbon



Chitra is of Indian heritage, was born and brought up in Singapore. She moved to London for her studies in Electronic Engineering at the University College London. Upon graduating, she joined Price Waterhouse (today PWC) to get her experience in audit and business advisory services and to obtain her Chartered Accountancy qualification. After qualifying, she moved into management consulting, which is where she met her future husband and business partner from Zürich, Roman.

When Chitra was pursuing her MBA at London Business School, between 1998 and 2000, she and Roman looked at various entrepreneurial opportunities from dot com businesses to real estate. Destiny brought them to the Algarve in 2001 and that is where they first put down their roots in real estate development and hotels, first off with the Martinhal Beach Resort and Hotel in Sagres, which opened in 2010. Since then, they have built and grown their real estate and hotel group into further locations in Portugal, as well as into commercial real estate development and an education business. All hotels have received several industry accolades, awards and mentions across international publications.

Since 2017, Chitra has been on several boards and advisory councils pro bono, such as the Entrepreneurs Organization in Portugal, the American Club of Lisbon, the Westmont Institute of Tourism and Hospitality and the Association of

Private Higher Education Institutions, and most importantly, on the Committee of Portugal IN for 3 years, a special task force created by the Portuguese Prime Minister's office to further enhance Foreign Direct Investment into Portugal (www.portugalin.gov.pt). Chitra and Roman have also engaged in various philanthropic endeavors, especially for education. They have donated to London Business School to fund scholarships and to local educational projects such as the new university buildings of Nova School of Business and Economics as well as the Católica School of Business and Economics.

In 2024, Chitra received the coveted "Medal of Merit" from the Portuguese government for her 23 years of service and contributions to the growth and innovation in the Tourism sector in Portugal. Between 2014 and 2023, Chitra received various other personal awards, including the prestigious Deloitte Institute "Accomplished Entrepreneur Award" at London Business School.

Apart from building their family business, Chitra and Roman have four children – all born in Portugal. Three of them are in universities in London, Lausanne and St. Gallen while their youngest is in school. They firmly believe in educating their children to pursue their passions while understanding their role as global citizens contributing to bringing the world forward.

Speakers



Edouard Thijssen

Co-Founder, Trusted Family



Edouard is a member of the Belgian family behind the Aliaxis Group, and founder of Trusted Family, the leading family office governance platform used by over 200 single family offices around the world.

After transitioning to a non-executive role at Trusted

Family, he joined Tema ETFs, a fast-growing active ETF Manager backed by Index Ventures and Accel. Edouard is originally from Belgium, then spent 5 years in NYC and has now been in London for 5 years.



Vidur Varma

Guest Lecturer, London Business School



Vidur is a Guest Lecturer at LBS and teaches the Wealth Management and Equity Investment Management electives for the master's programs and Personal Finance core subject for Master's in Financial Analysis programme.

He frequently teaches on ESG and Sustainable investing, Capital Markets, Hedge Funds and Liquid Alternatives, Technology trends, Crypto and Real Estate investing, in other elective courses, and for Executive Education.

As a practitioner, he brings together his experience and knowledge of the markets and business, to connect the dots between market events, academic concepts, current trends, and the future.

Vidur has 24 years of experience in banking and financial services - wealth management, investments, consumer banking, insurance, FX, and payments; across private clients, affluent & mass affluent customer segments, and has worked in the UK, Europe, Middle East, Africa, and Asia. He has worked for 22 years in Citibank, and his last role at Citibank was as Director – Head of Wealth Management for Citibank UK and Citi International Personal Bank EMEA (offshore banking), covering

P&L, strategy, product management, investment advisory, leading client facing specialist & advisory teams.

Vidur has extensively worked with wealthy families and family offices to help them with strategies to manage portfolios, intergenerational wealth transfer, set up and run family office, develop and execute investment strategies, identify external managers, invest in alternatives, manage risk, set up governance structure, understand and adapt to market changes and technology evolution, train the younger generation on wealth, and helping to build family legacy.

Vidur has been on the UK Finance – Personal Finance committee and before that on the British Bankers Association – Personal Products and Services' committee. He has also been the Chair of Citibank Consumer CASS Sub Committee for Client Assets. During his career he has extensively presented at industry conferences, client events, panel discussions and appeared on CNBC.

Currently, Vidur is a yoga teacher focusing on physical and mental well-being, managing stress, finding your purpose, and achieving full potential.

Speakers



Florin Vasvari

Professor of Accounting; Academic Director at the Institute of Entrepreneurship and Private Capital, London Business School



Professor Florin Vasvari teaches courses on Distressed Investing as well as Private Equity and Venture Capital. He is an expert on the use of accounting information in credit markets and private equity funds.

His research investigates the pricing and the role of accounting information in secondary debt markets, debt contracting issues, securitizations of syndicated loans, debt market intermediaries, bankruptcy valuation and private equity funds reporting practices and performance. His work on private equity includes work on ESG reporting, limited partners' private equity allocations, private equity valuation and performance measurement, private equity secondaries and aspects of risk management.

Florin has published over 20 academic articles in leading academic journals and many other articles in industry journals. He is frequently invited to present at top business schools around the world as well as academic and practitioner conferences.

Professor Vasvari currently serves as an Editor at The Accounting Review, a top journal published by the American Accounting Association. He also serves on the School's Management Board and Finance Committee.

With Eli Talmor, he co-authored Private Capital (vol. 1 Funds and vol. 2. Investments) in 2019. The book has been endorsed by leading figures in the private equity industry. Together with Eli, Florin has also co-authored International Private Equity, in 2011.



Ralph Welpé

Chairman and CEO, Mirai Capital Partners



Dr. Ralph Welpé has over 25 years of experience in finance and family offices. He is currently Chairman and CEO of Mirai Capital Partners in London. He worked in investment banking at Deutsche Bank from 1997-2015 in various senior positions in Europe and Asia. After that, he built a multi-generational family office for a US Fortune 500 family before joining Julius Bär running the coverage of the bank's

global top 100 clients. Ralph now advises large families on transactions, structuring and succession planning and is a Senior Advisor to Time Partners in London, KingsRock Advisors in New York, and LinHart Group in Singapore. Ralph holds an MBA and a PhD from the University of St. Gallen and was a research fellow at INSEAD in Fontainebleau.

Facilitators



Ian Frith

Associate Director, Advancement, London Business School



Ian is an Associate Director within London Business School's advancement team.

Ian has extensive experience across impact investing, philanthropy, and family enterprise. At LBS Ian works closely with the Institute of Entrepreneurship and Private Capital in growing its family enterprise programmes. Prior to LBS Ian worked for Acumen, a global leader in impact philanthropy for international development where he worked closely with family offices, next gens and impact entrepreneurs. Previously he was at King's

College London where he co-led the development of a centre for family business.

Ian was also previously an advisory council member for the DC Finance London Family Office Conference and part of the judging team for the Unilever Young Entrepreneur Awards

He holds a Bachelor's degree in Economics from the University of York and a postgraduate degree in education from the University of Cambridge.



Sonya Gladstone

Associate, RAH Partners



Sonya is an Associate at RAH Partners, where she collaborates with leadership teams on global searches, coaching, and succession planning. She is deeply committed to leadership advisory, with a keen interest in understanding human behaviour and thought processes. Sonya is motivated by bringing individuals and teams together to optimize performance, enabling them to achieve and exceed their goals.

Sonya earned a bachelor's degree in psychology from Yale University, with a concentration in team and organizational psychology. Her academic focus centred on human behaviour, specifically group psychology and the development of interpersonal relationships. This experience sparked her interest in business and management psychology, as well as team building in both athletics and corporate environments.

In addition to her professional and educational experience, Sonya has been involved in elite rowing for many years. As the coxswain for the Leander Club Men's Senior Team, she led the squad in both national and international competitions, guiding them toward Olympic-level performance. While at Yale, she was a Division I athlete, serving as a coxswain for the Men's Heavyweight Crew team. During her four years, the team achieved some of its most successful seasons, winning Ivy League, Eastern Conference, and IRA National Championships. Sonya's role as a cox honed her leadership, teamwork, and ability to perform under pressure—skills she applies in her work at RAH Partners.

Facilitators



Osman Haneef

Senior Manager of Ventures, Institute of Entrepreneurship and Private Capital, London Business School



Osman leads the startup Incubator at London Business School and supports the entrepreneurial programmes organized by the Institute of Entrepreneurship and Private Capital at LBS. He has advised countless start-ups and founders as a former UK director of the Founder Institute, one of the world's largest pre-seed accelerators.

Previously, Osman worked as the Country CEO of MILVIK (BIMA), one of the world's leading microinsurance and telehealth organizations. Osman

oversaw the development and launch of BIMA's products and operations in an emerging market, which he scaled to a team of 1200 employees providing services to over 3 million customers.

He is an award-winning novelist and has written for international publications on start-up ecosystems in emerging markets. He was selected as a Young Global Leader by the World Economic Forum in 2017. Osman graduated with an MBA and an MA in International Relations from Yale University.



Ryan Hargreaves

Executive Coach, London Business School



Ryan is a truly unique individual with high executive functioning and strong emotional intelligence. As a former Buddhist monk who has spent long periods in silent meditation retreat, he has powerful focus and mental clarity which enable him to be reflective, make wise business decisions and think outside the conventional narrative. With over a decade

of public speaking experience, he has excellent communication skills and captures the attention of those he interacts with.

As an executive coach to several high-profile clients, Ryan is known for his integrity and has earned the trust of a rich network of senior professionals across industries and continents.



Alexander Hayward

Executive Fellow of Accounting, London Business School



Alexander Hayward joins London Business School as an Executive Fellow specialising in Family Offices.

Over the last 15 years, Alexander has analysed more than 100 Single Family Offices across the UK, Americas, Middle East, Europe and Asia Pacific, examining their setup, structures and investment strategies.

An expert in the management of complex, multi-generational family businesses, Alexander has also implemented comprehensive risk management frameworks that incorporate tax, mobility, financial controls, and succession planning.

Holding a Master's degree from the University of Oxford, he previously worked in collaboration with Northwestern University to deliver coaching and training for Next Generation members preparing to take up roles in family businesses and offices.

His focus on strategy and governance aims to encourage Family Offices to embrace new opportunities and develop cultures of long-term sustainable growth.

Facilitators



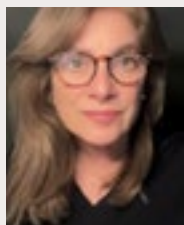
Grace Headinger

PhD Student in Strategy and Entrepreneurship, London Business School



Grace Headinger is a PhD student in Strategy and Entrepreneurship at London Business School. Her research explores how entrepreneurial families leverage family offices and foundations to shape their competitive environments, particularly through the use of philanthropy, impact initiatives, and institutional partnerships, to promote long-term value creation. She also researches the process of professionalization in family enterprises, focusing on the development of formal decision-making processes, management practices, and

governance institutions over time. Prior to LBS, she was a Research Associate in the Finance and Entrepreneurial Management units at Harvard Business School, where she co-authored over a dozen HBS case studies on family enterprises and helped launch How to Not Bankrupt Your Family, a first-of-its-kind MBA elective course on family offices. She graduated Magna Cum Laude from George Washington University's Elliott School of International Affairs with a B.A. in International Affairs and a minor in Economics.



Francesca Lahiguera

Carer Coach, Leadership Careers Team, London Business School



Francesca Lahiguera is a career coach in the Leadership Careers team. She spent over 25 years in executive search, most recently as a partner with Lancor, a search firm serving PE owners and their portfolio companies. She has also advised social enterprises, NGOs and private foundations on their most critical hires. She started her search career as a principal with the technology practice of Heidrick &

Struggles before working with not-for-profit sector clients, where she specialised in leadership roles in social investment and engaged philanthropy. Prior to search, Francesca spent 12 years in enterprise technology in corporate and field marketing roles, based in Boston, Munich and Paris. She is an US/French national and a graduate of Boston University.

Facilitators



Vyla Lejeune Rollins

Executive Director, Leadership Institute, London Business School



Vyla Lejeune Rollins is an award-winning Business Psychologist who has worked as a global strategic Organisational and Boardroom Effectiveness consultant and facilitator for over 30 years. An American by birth, but based in the UK for her entire career, Vyla's area of expertise is in working with businesses to systemically diagnose organisational performance and implement strategic organisational effectiveness interventions at individual, group, board and enterprise levels.

Vyla is currently the Executive Director of the London Business School Leadership Institute. As part of her Institute role, she also acts as featured Guest Speaker/Facilitator for the School's Introduction to Corporate Governance and Board Effectiveness Course led by Professor Randall S. Peterson, Academic Director of the Leadership Institute and Professor of Organisational Behaviour at London Business School. She was also a co-author and Programme Director for a ground-breaking research effort commissioned by the Financial Reporting Council, exploring how to create effective and inclusive boardroom cultures.

Vyla is also part of the exclusive Executive Coaching and Strategy Tutor community that supports London Business School's open enrollment Executive Education Programmes and degree as well as being a Programme Director, and Learning Facilitator for bespoke educational programmes commissioned by organisations from London Business School's Executive Education Group. She is regularly invited by Executive Education to design and/or coach on custom programmes focusing on board effectiveness education, and she is a co-founder of the LBS Family Member Board Effectiveness Educational Initiative, collaborating with fellow co-founders Alexander Hayward, Randall S. Peterson, and Asa Bjornberg, on the development and delivery of specialist interventions designed to cultivate family board effectiveness.

Vyla is a Member of the Family Firm Institute, the leading global association worldwide for family enterprise professionals advisors, consultants, educators, and researchers who aspire to support the development on trans-generational family enterprises, and a donor to the Family Business Research Foundation. Vyla is also a Fellow of the Royal Society of Medicine, an Associate Fellow of the British Psychological Society, an Associate Member of the International Society of Coaching Psychology, and a Member of the Association of Business Psychologists.

As well as being a Board Advisor, she is also Chair of the Clore Social Leadership Foundation, a Trustee of the National Youth Orchestra of Great Britain, a former Mentor for the Tate Cultural Leadership Programme, and is a former member of the Selection Board for the Prince's Trust East London branch. She is also a member of the Novartis Culture Leadership Board (C-LAB) a group of world-leading external experts and senior leaders from across Novartis, supporting the organisation in shaping a more forward-thinking, performance-oriented culture.

Vyla received her BA in Industrial/ Organisational Psychology from Occidental College in the US and her M.Phil. in Organisational Behaviour from Bath University in England. She also holds a Certificate in Counselling and Psychotherapy from CCPE, a Certificate in Board Dynamics from the Tavistock Institute of Group Relations, a Diploma in Coaching Supervision (Level 7) from the Institute of Leadership and Management, and Professional Certificates in Research Management and Teaching for Researchers from the Cambridge Centre for Innovation and Development. Vyla has also completed The Governance Institute of UK and Ireland's (ICSA) Non-Executive Directors Programme and the London Business School's Sustainability Leadership and Corporate Responsibility Programme.



Facilitators



Brian Pohl

Private Investor



Brian is a hands-on leader in business, with a specialised focus on the business of wine (M&A and advising on wine assets) and is also a Master of Wine candidate. As a principal investor, he has successfully restructured a variety of underperforming or distressed companies, ranging from media to manufacturing, and was CEO of a listed venture capital fund.

He is active in Tiger 21 (chairing geographic and global groups) and serves on the Chair Advisory Council. He is also active in YPO-WPO, having served in executive leadership positions in YPO's

Global Deal Network. He is currently vice-chair of YPO's Global Wine Network, setting the education agendas in addition to chairing networks, events, and multi-day retreats in Russia, Switzerland, Canada, the EU, and the UK.

Pohl was raised in Alberta, Canada, and studied at the University of Alberta (B.Sc. 1988, MBA 1990) and later at London Business School in the UK (M.Sc. Finance 1999). He has given back by serving on the schools' Advisory Council and International Alumni Board.



Renata Thome

Executive MBA Student, London Business School



Renata Thome is a finance professional with a strong background in impact investing, sustainable finance, and venture capital. She has experience in investor relations, fundraising, and business development, focusing on investments that generate both financial returns and positive social and environmental impact.

She has worked in Investor Relations at Boxfund VC, a UK-based venture capital fund focused on ESG-driven consumer brands, and was Director at ProNatura International, where she led fundraising efforts with family offices, corporations, and financial

institutions to support sustainable development projects. Additionally, she co-founded Alpha'a Inc., an art platform with a social and environmental mission, securing over \$3 million in funding and expanding the business globally.

Renata is currently pursuing an Executive MBA at London Business School and holds a certification in Business and Climate Change from the University of Cambridge. With international experience and a commitment to responsible investing, she aims to drive capital allocation toward impactful and sustainable solutions.

Facilitators



Juliet Valdinger

Consultant



Juliet has been solving problems and building networks for nearly 25 years. She has been deeply embedded in philanthropy and social investment for nearly 25 years. In her first role, and under the vision of a Goodwill Ambassador to the Nelson Mandela Children's Fund at Whatever It Takes, Juliet led a small team to generate \$100million+ royalties to date for a wide range of charities. Since then, Juliet has established a diverse portfolio for her work. She has worked for small and large charities, three grantmaking foundations, individual philanthropists, and entrepreneurs with topics ranging from

facilitating engagement in the philanthropy sector, disability to climate-change, and has interviewed people about their life stories. Juliet worked in the asset management industry on fund management and then full-time as Senior Grants Manager for one of their client's Foundation.

Juliet holds an MSc. Grantmaking, Philanthropy and Social Investment at the Bayes Business School (Distinction) and a BA Social Anthropology at the London School of Economics (2.1).



Sunny Wang

PhD Student, London Business School



Sunny is currently pursuing a PhD in Strategy and Entrepreneurship at London Business School. She has a keen interest in research on family businesses, specifically focusing on succession issues and conflicts within these organizations. With a solid academic foundation, she earned an MSc in Innovation, Entrepreneurship, and Management from Imperial College Business School. Prior to that, she successfully completed an MSc in Finance and Economics at the London School of Economics. Sunny's educational journey began with a BA(Hons) in Economics from the University of Manchester.

Her professional journey reflects versatility and proficiency across various sectors. Before initiating her doctoral studies, Sunny contributed significantly to the development of asset liability management tools for high-net-worth individuals at a wealth management scale-up in London. She conducted in-depth portfolio and asset analyses, working closely with clients to support their financial planning. Her adept understanding of financial markets and risk management allowed her to tailor

recommendations to clients' risk tolerance and investment objectives.

Prior to her role in wealth management, Sunny held a position in Investor Relations for one of Taiwan's largest family businesses. In this role, she ensured fair stock valuation and played a pivotal role in enhancing the company's ESG initiatives. This experience equipped her with the ability to cultivate strong relationships with portfolio managers and analysts, track investor sentiment, and gain a profound understanding of the unique challenges and opportunities faced by family businesses.

Her experience in a London-based hedge fund also provided valuable insights into deal origination and due diligence within the fintech sector. Operating in a fast-paced environment, Sunny honed her analytical and strategic thinking skills. Throughout her career, she has consistently demonstrated a passion for understanding what drives business success.

Facilitators



Karen Wilson

Guest Lecturer, London Business School



Karen's core expertise is in finance, including capital markets, venture capital, impact investing and sustainable finance. She works with a range of investors and across asset classes on impact, ESG and sustainability strategies and teaches at leading business schools and universities, including London Business School.

Throughout her career, she has bridged the private, public and academic sectors. In addition to leading work on entrepreneurial finance, impact investment and impact measurement at the OECD for over a decade, she co-led the launch of the Impact Management Platform, which focuses on building coherence on sustainability standards for companies and investors.

She currently serves on the Pictet Group Impact and Sustainability Advisory Board, Chairs the Supervisory Board of the Impact Linked F Karen Finance Fund and Chairs the Adjudicating Panel of the Earth Foundation's Earth Prize. She also serves on the Climate Advisory Group of the Multi-Asset Climate Solutions Fund of Aberdeen Standard Investments and the Social Advisory Group of the Columbia Threadneedle UK Social Bond Fund. She also works with venture capital and impact funds. In 2022, she was selected by the Sorenson Impact Institute as a Global Impact Leader.

She received, with honors, a Bachelor's of Science in Mathematics and Management from Carnegie Mellon University and an MBA from Harvard Business School.

Organising committee

Luisa Alemany

Academic Director, IEPC, London Business School

Åsa Björnberg

Lecturer and Executive Coach, London Business School

Heinz-Peter Elstrodt

Guest lecturer, London Business School

Ian Frith

Advancement, London Business School

Rhian-Anwen Hamill

Managing Partner, RAH Partners Ltd

Jane Khedair

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Rupert Merson

Adjunct Professor, London Business School

Narayan Naik

Professor of Finance, London Business School

Eva Negrutzi

Senior Programme and Communications Manager, IEPC, London Business School

Sairina Ramakrishnan

Events Manager, IEPC, London Business School

Vidur Varma

Guest Lecturer, London Business School

Florin Vasvari

Academic Director, IEPC, London Business School

Ralph Welpé

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Palash Maheshwari

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Scott Riswold

Speakers Team Student Executive Committee, London Business School

Jai Singhal

Production Team Student Executive Committee, London Business School



The Institute of Entrepreneurship and Private Capital (IEPC)

Renowned for teaching entrepreneurship since the late 90's, for the cultivation of start-up ventures, and the promotion of innovation, London Business School (LBS) is similarly well known for its research insights into financial markets and its exceptional teaching of the key instruments that drive today's financial sector.

Entrepreneurship and finance have been at the heart of London Business School for the last 20 years. In 2021, we launched the Institute of Entrepreneurship and Private Capital (IEPC), born from a timely merger of the Institute of Innovation and Entrepreneurship and the Centre for Private Equity.

Both the Institute and Centre were already hugely significant, within London Business School and as parts of the wider business ecosystem. Together, we aim to become an unparalleled centre for education, policy shaping and events covering all aspects of entrepreneurship, from idea generation to financing, and private markets investing.

The IEPC supports the development of the entrepreneurial mindset and ideas that drive impact, create wealth and advance well-being while giving wider exposure

to probing and insightful research into the crucially important aspects of today's private capital markets, such as venture capital, growth and buyouts, and the entrepreneurial ecosystem.

Family enterprises, encompassing both family businesses and family offices, are integral to the entrepreneurial and funding ecosystems, with more than 5 million family firms in the UK alone employing almost 14 million people. The purpose of family enterprises marks their distinction, with their longevity across multiple generations being their driver. Successors to the helm are custodians of the entity for future generations and strive to make an ongoing difference. The IEPC aims to support family enterprises across the world through research, teaching, and resources across the world. Our students and alumni can benefit from our growing family enterprise initiatives.

Our Family Enterprise Initiatives

Our programmes offer a unique opportunity to engage with key players in the family business and family office ecosystem. They provide an exclusive platform for networking, thought leadership, and brand visibility with family members, senior executives, students, and alumni from across the world.

Contact us for sponsorship opportunities:

Jane Khedair, Executive Director, IEPC
jkhedair@london.edu



How will you build sustainability and preserve your legacy?

Ensure generational prosperity for your family business with our five-day programme, Leading the Family Office.

Designed for families of wealth, this course is ideal for those considering or establishing a single-family office, as well as those seeking best practices for managing an existing one.

Gain cutting-edge insights on succession planning, governance, and wealth management from world-class faculty and esteemed guest speakers in the field.

Exclusive Offer: As a valued delegate of the Family Office Conference, enjoy a **10% discount** on our upcoming programme, taking place **29 September – 03 October**.

Apply by 31 March 2025 at www.london.edu/ltfo and quote **'FOC2025'** on your application form.

For more details, contact our Client Relationship Manager:

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Family Office Service

This year's event is sponsored by Schroders, your partner for Private Assets and Family Office Services.

Schroders is a global asset and wealth management business. It is a FTSE 100 company and still 43%-owned by the family who founded it over 200 years ago.

The firm invests for its clients across asset classes and in both public and private markets, helping them to achieve their long-term financial goals while also achieving positive impact in the world. Schroders was entrusted with funds under management of £773.7bn as of 30 June 2024, and wealth management assets of £119.5bn.

In 2020, the firm acquired multi-family office Sandaire and created Schroders Family Office Service. Today, the team works with both established family offices and and

large family groups, wherever they are based. It develops solutions that reflect families' unique circumstances, working in partnership with existing advisers. This includes investment across both public and private markets as well as strategic advice on the complexities that can come with significant family wealth. The team works closely with our specialists in philanthropy as well as impact and sustainable investment. We believe that reflecting the values of the next generation of family members is both the key challenge, and opportunity, for the family office sector.

Connect with us



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