

SFO ALLIANCE SFO WEEK 2022

SFO
Alliance

A unique peer-to-peer network founded by
single family offices for single family offices

8 - 10 June | London



Foreword

Dear Member,

We are now at the end of our second year building the SFO Alliance. Keith Johnston and myself have carefully on-boarded over 275 single family offices all with over \$400m in assets. Together we have organised over 100 online events; introducing members to each other, as well as socialising investment opportunities that members have invested in, and wanted to share with their peers.

At SFO Week, which is our first large scale event, we want to stay true to our nature of member generated content, with plenty of peer-to-peer conversations, and that is why we have chosen a dialogue format. As opposed to sitting in a room listening to a fire-side chat, we have single family office moderators whose role it is to engage the room, and to ensure that we hear from as many people as possible. This way we hope that you get a good feel for who might be advantageous speaking to over lunch, dinner or during the garden party, and perhaps even after the event.

As membership is free I would like to thank our sponsors for allowing us to put on this event, and for Keith and his team Alex, Louise, and Alexandra, to be able to work full-time on the SFO Alliance. James Morgon gave us invaluable advice and guidance and I thank you for that James. I would also like to thank some of the friends of the alliance who are attending. All of these have introduced a significant number of new members and we are grateful for this.

Finally I would love feedback from anyone present to help us improve, for the benefit of all. We know what we don't like so much about other conferences, but time will tell if we actually do a better job or not.

Please enjoy the conference, make new contacts, and celebrate this post-Covid world where we finally can all be together again.



Lex van Dam

SFO Week Programme, London, 8-10 June 2022

Participants should attend those dialogues they have registered for.
If you are on the waiting list please let a member of staff know and they will try and seat you.

Wednesday 8 June

08.00 TO 05.30 PM

MORGAN STANLEY FAMILY OFFICE CONFERENCE *The Biltmore*

The day has been built by Morgan Stanley in partnership with SFO Alliance specifically for family offices, featuring thought leaders from Investment Management, PWM, IED, Research and Prime Brokerage, as well as family office members of the SFO Alliance.

07.00 PM

OVERSEAS GUESTS WELCOME DINNER *Saint Jacques*



Thursday 9 June

08.45 TO 09.00 AM	REGISTRATION <i>Hall of India Foyer, first floor</i> We recommend getting to the venue and to your seats early. The hollow square format means latecomers will need to sit around the edges of the square.
09.00 TO 09.30 AM	NETWORKING AND BREAKFAST <i>Wrench Room, first floor</i>
09.30 TO 11.30 AM	MACRO-ECONOMIC ENVIRONMENT - RISKS AND OPPORTUNITIES <i>Hall of India, first floor</i>
OR	
09.30 TO 11.30 AM	CRYPTO INVESTMENT STRATEGIES <i>1910 Room, lower ground floor</i>
11.30 TO 12.00 PM	NETWORKING AND WORKING LUNCH PICKUP <i>Wrench Room, first floor</i>
12.00 TO 02.00 PM	FUND SELECTION <i>1910 Room, lower ground floor</i>
OR	
12.00 TO 02.00 PM	DIRECT PE INVESTING <i>Hall of India, first floor</i>
02.00 TO 02.30 PM	NETWORKING AND AFTERNOON TEA <i>Wrench Room, first floor</i>
02.30 TO 04.30 PM	FUTURE OF HEALTH <i>Hall of India, first floor</i>
OR	
02.30 TO 04.30 PM	REAL ESTATE STRATEGIES <i>1910 Room, lower ground floor</i>
06.00 PM	RECEPTION <i>Phillips, 30 Berkeley Square</i>
07.30 PM	DINNER <i>As per personal invite</i>

Friday 10 June

08.45 TO 09.00 AM

REGISTRATION *Hall of India Foyer, first floor*

09.00 TO 09.30 AM

NETWORKING AND BREAKFAST *Wrench Room, first floor*

09.30 TO 11.30 AM

NEGOTIATING COMPENSATION IN THE SINGLE FAMILY OFFICE *Hall of India, first floor*

OR

09.30 TO 11.30 AM

IMPACT INVESTING *1910 Room, lower ground floor*

11.30 TO 12.00 PM

NETWORKING AND WORKING LUNCH PICKUP *Wrench Room, first floor*

12.00 TO 02.00 PM

VENTURE CAPITAL *Hall of India, first floor*

OR

12.00 TO 02.00 PM

CREDIT STRATEGIES *1910 Room, lower ground floor*

02.00 TO 05.30 PM

GARDEN PARTY

Networking drinks and light food provided in the glorious gardens of the Royal Over-Seas League overlooking Green Park.



Wi-Fi Access

Use this QR code to access the Wi-Fi:



Or login:

User name SIX PARK PLACE

Password SixEvents

Room Locations:

The event is largely taking place on the first and Lower-ground floors of the venue.

The Hall of India:

First floor next to the registration desk.

The 1910 Room:

Based on the lower ground floor.

The Rutland Room:

Shared meeting space on the first floor.

Wrench and Bennet-Clark Room:

Located on the first floor.

Cloakroom:

Reception near entry on the ground floor.

Supporters

Lakestar - Ninja Struye

ninja@lakestar.com

Lakestar's mission is to find, fund and grow disruptive businesses - enabled by technology - that are founded by exceptional entrepreneurs in Europe and beyond.

Founded by Klaus Hommels, the team's early investments include Skype, Spotify, Facebook and Airbnb. Since raising its first fund in 2012, Lakestar manages an aggregated volume of over €1.2bn across three early stage funds and a growth fund.

The team actively advises and supports portfolio companies in marketing, recruitment, technology, product development and regulatory insight, accompanying founders from seed to early stage to growth stage or exit. Lakestar currently has the privilege of holding investments in Revolut, Blockchain.com, Opendoor, Oscar, GetYourGuide, Glovo, sennder, Eigen, FiveAI, Public.com, SoFi, Solarisbank, Uncapped, Rhino, ZEBEDEE and Hometogo to name a few. Lakestar has presence in Berlin, Zurich and London.

The Lakestar logo is contained within a thin black rectangular border. It features the word "LAKE" in a tall, thin, sans-serif font, positioned above a horizontal line. Below the line is the word "STAR" in a similar, slightly wider sans-serif font.

LAKE
STAR

Visit us on LinkedIn and our website www.lakestar.com

Supporters

Morgan Stanley - Max Harper

Max.Harper@morganstanley.com

Established in 1975 as a subsidiary of Morgan Stanley Group Inc., Morgan Stanley Investment Management (the Firm) has provided client-centric investment and risk-management solutions to a wide range of investors and institutions for more than 40 years.

Our investment teams strive to provide strong investment performance, excellent client service and a comprehensive suite of investment management solutions to a diverse client base, including governments, institutions, corporations and individuals worldwide. In March 2021, Morgan Stanley completed the acquisition of Eaton Vance, including its market-leading affiliates Calvert Research and Management and Parametric Portfolio Associates LLC.

The Morgan Stanley logo is displayed within a dark blue rectangular box. The text "Morgan Stanley" is written in a white, serif font, centered within the box.

Morgan Stanley

Supporters

Outlier Ventures - Chris Donovan

chris@outlierventures.io

Outlier Ventures is the largest Web 3 accelerator in the world. Founded in 2014, it works with startups at various stages of their lifecycle from pre-seed / seed (via Base Camp) to later stage about to launch (or live) token networks specialising in a New Data Economy, NFTs, and DeFi bringing together a network of 1,000's of the world's leading web 3 founders, protocols, VCs to mentor, and invest.

Outlier Ventures[•]

Supporters

Kedge - Capital - Michael Johnson
Michael.Johnson@kedgecapital.com



Kedge Capital was founded in 2002 in partnership with Ernesto Bertarelli and the B-Flexion group.

Kedge Capital's Private Equity business manages over \$5bn AUM. We partner with specialist private equity managers with a proven approach to value creation and that have delivered consistently compelling returns. We seek managers with focused knowledge of a specific sector, comparable to a strategic investor. We support the activity of these managers with patient capital across both funds and co-investments. We target co-investments in market leading businesses in well-structured industries underpinned by stable demand drivers, with outsized return potential delivered through strategic and operational actions. Our approach, expertise and relationships have delivered consistent, outstanding performance.

Kedge Capital primarily partners with single and multi-family offices to deliver bespoke access to "best in class" private equity.

Supporters

Octopus Investments - Emma Whittingham

Emma.Whittingham@octopusinvestments.com

Octopus Ventures is a collective of experts and individuals. Disparate world views and diverse skill sets, yet with a shared purpose; to invest in a world that we, and future generations, can be proud of.

Our belief is that you can build a better tomorrow by investing in it. Yet for us, investment is multi-dimensional, and will always be about more than just money. It means giving time, energy and focus, committing to a cause; to a belief, to optimism.

With offices in London and New York and a network that spans from San Francisco to China, we're one of Europe's largest and most active venture capital investors.

octopus ventures

Supporters

Carlyon Services - Philip Higson

philip@carlyon.ch

Independent advisory firm with focus on risk adjusted returns. We perform exceptional due diligence of funds and single companies. In our role as independent investment committee members, we challenge the validity of classic investment strategies.

We provide portfolio oversight and help family principals take better decisions for assets and liabilities.

The logo for Carlyon Services features the company name in a dark grey serif font. A thick, orange diagonal line is positioned behind the text, starting from the bottom left and extending upwards to the right, passing behind the letters 'y' and 'o'.

Supporters

A/O PropTech - Anika Scott
anika@aopropotech.com

a/o proptech

A/O PropTech is Europe's largest proptech venture capital firm focussed on category- leading investments driving disruption in real estate and positively impacting the entire build world ecosystem. Launched in 2019, A/O has rare strategic access to a diverse portfolio of \$40 billion in real estate assets and is backed by some of the largest and most forward thinking real estate owners, operators and family offices in Europe who share A/O's vision and commitment to improving quality of life, accelerating sustainable living, and enabling decarbonisation of the largest asset class in the world.

A/O was founded and is led by one of Europe's leading and highly successful proptech venture capitalists, Gregory Dewerpe, and in 2020 became the first VC to join the World

Economic Forum (WEF) as a member of its Global Innovators Community. The team's specialist investment, strategic and operational skillsets, combined with in-house real estate, data science and technology expertise, make A/O one of the most differentiated sector-focused teams in the industry.

Supporters

CFM - Stephane Vial

Stephane.Vial@cfm.fr



Capital Fund Management (CFM) is a successful alternative investment manager and a pioneer in the field of quantitative trading applied to capital markets across the globe. Our methodology relies on statistically robust analysis of terabytes of financial data for asset allocation, trading decisions and automated order execution.

CFM is an appealing career destination for highly-talented and passionate PhDs, IT engineers and experts from around the world. Our people can rely on original theoretical insight accumulated over 30 years of market experience, as well as cutting-edge technology and disciplined approaches.

These fundamentals allow us to foster the creation of exciting opportunities and state-of-the-art trading strategies. Our people's diversity and dedication contribute to CFM's unique culture of research, innovation and achievement.

The company is regulated by AMF, the SEC and the CFTC, with assets under management of over \$8 billion.

Supporters

Mindstruck - James Morgon

James@mindstruck.com

Mindstruck is an investment company designed to take advantage of untapped growth opportunities in the Primordial Preventative Health sector.

The logo for Mindstruck, featuring the word "mindstruck" in a bold, white, lowercase sans-serif font, centered within a solid black rectangular background.

mindstruck

The Future - Special Investment Groups (SIGs)

Now that we have close to 300 single family office members we are starting to establish Special Investment Groups. These currently include:

- Crypto
- Credit
- Venture Capital

We also have plans to establish a Macro group for C-Suite executives and groups covering Direct PE, Fund Selection and Real Estate.

These groups work because members kindly volunteer their time. We already have seven members who are acting as co-chairs of these groups. If you wish to join a group or want to volunteer to co-chair one, please contact CEO Keith Johnston keith.j@sfo-alliance.com.

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WWW.SFO-ALLIANCE.COM



