

The Meaning of Wealth in the 21st century

Experiences from Asia, Europe and the Americas

in partnership with

withersworldwide



BNY MELLON



London

Stock Exchange Group

Milano, 30 January 2017 - 5.00 to 9.00 pm

*Places are limited, registration required **by 25th January** at
segreteria@familyofficer.it / +39 02 36590254.*

In order to attend, please wait for AIFO confirmation

*Palazzo Parigi, Corso di Porta Nuova 1
Milano*

Introduction

The II International Family Office Round Table was inspired by the research “*The meaning of wealth in the 21st century*” promoted by Withersworldwide.

‘Wealth matters because of what you can do with it.’

No one would argue with this premise, but what do successful families think they should do with their wealth? How do they overcome the challenges of continuity and cohesion through generational succession?

How do they approach the education, training and development of younger generations? And how do the answers to these questions vary in different parts of the world?



Agenda

5.00 – 5.30 p.m.		<i>Registration</i>
5.30 – 5.45 p.m.	Introduction Patrizia Misciattelli delle Ripe , <i>President AIFO</i>	IT
5.45 – 7.15 p.m.	Tax and Legal structures for International Families Filippo Nosedà , <i>Partner and Wealth Planning Practice Group Leader Withersworldwide</i> Roberta Crivellaro , <i>Managing Partner of the Italian practice, Withersworldwide</i> Giulia Cipollini , <i>Partner and Head of Tax of the Italian practice, Withersworldwide</i>	<i>Discussion</i> IT
	Direct Investing, a growing trend for Family Offices: the ELITE Club Deal platform Michele Troiani , <i>Head of Institutional Investors Relationship Management, London Stock Exchange</i>	IT
	Why successful families create Family Offices Yolande Escher , <i>Director for Family Office Services at BNY Mellon Wealth Management</i>	EN
	Wealth and intangible values Fadrique de Vargas Machuca , <i>AIFO Executive Committee – Director of AIFO Academy</i>	IT
7.15 – 7.30 p.m.	Q&A session	
7.30 – 8.00 p.m.	<i>Master in Family Office Graduation Celebration</i>	
8.00 – 9.00 p.m.	Cocktail	

Brief Bios of the Speakers

Patrizia Misciattelli delle Ripe, *President AIFO*

Patrizia founded and chairs AIFO since 2006, to promote a community with high level of professionalism according to international standards, capable of sharing knowledge and awareness among those called upon to protect important family assets, in generational continuity and positive social impact. In the years between 1983 and 2003 she has been top manager in big players of the private banking segment: Board Director in Finanza e Futuro Holding, General Manager of BNL Investimenti SIM, Country Manager for J. Rothschild Assurance / CEO in Nascent SIM. She is the author of volumes published by "Il Sole 24 Ore" and Franco Angeli. She is a mentor in generational continuity projects and speaker at several conferences and seminars on succession planning and Family Office topics.

Filippo Nosedà, *Partner and Wealth Planning Practice Group Leader Withersworldwide*

Filippo is a dual qualified English solicitor and Swiss lawyer and advises on international tax and estate planning issues, on the establishment and restructuring of both trusts and foundations as well as on UK and international tax issues for both wealthy individuals and governments. He advised several governments in relation to the introduction of foundations' laws. In 2008, he represented STEP at a public hearing organized by the OECD's on high net worth individuals. Filippo is guest lecturer in several university in Europe and member of The Society of Trust and Estate Practitioners and the International Academy of Estate and Trust Law

Roberta Crivellaro, *Managing Partner of the Italian practice, Withersworldwide*

Roberta is the Managing Partner of the Italian practice in Milan and responsible for the firm's five Italian desks worldwide. She specializes in corporate and commercial cross-border transactions and international litigation as well as brands and residential and commercial real estate. Roberta has developed considerable food and beverage sector expertise and, in 2014, 2015 and 2016 was ranked as a "Recommended Lawyer" by Legal500 EMEA. She is a dual qualified Italian lawyer and English solicitor and a member of the International Bar Association as well as Honorary Treasurer of the Italian Chamber of Commerce and Industry for the UK.

Giulia Cipollini, *Partner and Head of Tax of the Italian Practice, Withersworldwide*

Giulia provides domestic and international tax planning advice on corporate, M&A and real estate transactions. In addition, she advises private clients, high net worth individuals and families on matters relating to family businesses, wealth planning, trusts, and succession issues. She is a registered member of STEP, IFA and ASLA and in 2016 was appointed to join a working group which will make recommendations to the Chamber of Deputies on the drafting of the tax aspects of a new trust law for Italy.

Michele Troiani, *Head of Institutional Investors Relationship Management, London Stock Exchange*

Michele Troiani is Head of Institutional Investors Relationship manager at London Stock Exchange. He joined the Institutional Investors Team at LSEG in 2013, focusing on growing the BuySide coverage and increasing their interaction with the Exchange. He is responsible for the UK and Europe Asset Management coverage. Michele started his career in the equity division of Goldman Sachs where he spent 12 years, with different roles, between London, Milan and New York. He became head of Sales Trading to Southern Europe in 2009. He graduated with honors in International Financial Markets at Bocconi University.

Yolande Escher, *Director for Family Office Services at BNY Mellon Wealth Management*

Yolande Escher is Director for Family Office Services at BNY Mellon Wealth Management. She is based in London from where she advises European, Middle Eastern and Asian family offices how to create operational efficiencies within a trusted, global custody relationship with the world's largest custodian - BNY Mellon. Wealthy families increasingly seek the right partner in global custody, fund administration and investment servicing to help in setting up and running a successful family office.

Fadrique de Vargas Machuca, *AIFO Executive Committee - Director of AIFO Academy*

Member of AIFO Executive Committee, Fadrique founded AIFO Academy, which she chairs, in 2014. AIFO Academy promotes the professional identity of the Family Officer, professional who is able to integrate into a single project the customized strategies for the continuity and sustainability of a multigenerational family heritage in its tangible and intangible aspects. She started her career in A.T. Kearney as a Business Analyst and then as Communication Specialist and member of the inner Faculty. Fadrique is an advisor on consulting projects and training to improve the effectiveness of problem-solving, leadership and communication. She teaches at the Università Cattolica di Milano, IULM and ISPI the techniques and improved methods of written and verbal corporate communication.

Contacts

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