

PERE

FAMILY OFFICE & PRIVATE INVESTOR FORUM: PARIS

26 March 2015 | The Peninsula Hotel | Paris, France

25 March 2015: VIP Dinner for Family Offices *(By invitation only)*

26 March 2015: Forum Agenda

MAIN FORUM:

0830 Main Forum registration & refreshments

0900 **PERE Welcome**

0910 **Chair's opening remarks: The private real estate landscape for family offices**

Chairman:

Basil J. Demeroutis, Managing Partner, FORE Partnership, UK

0930 **The global macro-overview of real estate: Europe, US and Asia**

- The geopolitical landscape and its impact on the real estate markets
- The macro outlook, monetary policies in Europe and the resulting opportunities and risks as relates to real estate
- Analysing global real estate cycles – where are we in the cycle in the key regions globally?
- Identifying drivers and trends that should be influencing real estate portfolio decisions: Demographic, tourism, commerce, infrastructure, employment

1000 **Building your real estate investment strategy**

- Determining where you are on the risk/return spectrum – examining return profiles across assets and markets
- Are you an opportunistic investor or a strategic investor? How will this impact your strategy?
- Holding vs trading strategy
- What are your requirements in real estate – returns, location?
- Sourcing and executing off-market transactions
- Getting your processes in place to ensure you can execute on deals quickly
- How do they adjust their strategy for different markets and assets?
- Top five ideas for 2015 –the markets and sectors that are on our panels radar

Moderator:

Jeremy Gates, Director, Real Estate Capital Investors Limited, UK

Speakers:

Rafael Kisslinger da Silva, Head of Family Office — Real Estate, Grupo Condor, Germany

Duncan Scorey, Director, Private Capital & Fixed Income, Capital Generation Partners, UK

Richard A Johnson, Global Head of Business Development – Global Real Estate, UBS Global Asset Management, Switzerland

1050 **How are family offices gaining global exposure to real estate and how do they enter markets?**

- Where are our panel investing in real estate –allocations: Europe, US, Asia
- Including secondary cities/regions in your real estate portfolio: What trends are driving growth in non-prime locations and do they have solid fundamentals?

- What assets do they favour – commercial, residential, retail, agri, development land?
- How are they accessing and holding real estate – investment vehicles, direct investments, holding companies, JVs
- Direct vs indirect deals, Internal team vs external advisors, selecting and working with fund managers
- Current vs future allocations to real estate – is it becoming more or less important in their portfolios and how is the nature of the assets they are holding changing?

Moderator:

Basil J. Demeroutis, Managing Partner, FORE Partnership, UK

Speakers:

Gregory Winssinger, Director & Portfolio Manager, ImmofinRE, Luxembourg

Paul Kang, President and Chief Investment Officer, ALTACAP, USA

Sam Desimple, Senior Investment Manager, Tosalu NV, Belgium

Alexandre de Vaivre, Chief Investment Officer Switzerland & Partner, Aurium, Switzerland

1140 Networking and refreshments

1210 The real estate market in France: Invest or avoid?

Speaker:

Francesca Galante, Co-Founder, First Growth Real Estate, France

1240 The opportunities in global agri-business and timberland

- How do we get true exposure to farm and timberland and the broader value chain?
- The trends that are shaping the asset classes

Moderator:

Louisa Burwood-Taylor, Editor, Agri Investor, UK

Speakers:

Kevin Schwartz, President & Founding Partner, Paine & Partners, USA

Gerard J. Keating, President & Chief Executive Officer, Keating Resources, USA

Stéphane Ledentu, Chief Executive Officer, Group SLB, France

1330 Networking lunch

1450 Investing to hold - building a strong income-generating portfolio of real estate

- Does investing in income generating property make sense for your family office?
- Where are the income opportunities in commercial compared to residential?
- Working with the right operating partners – how to find them, conduct proper due diligence and monitor performance

Speaker:

Martin Oliver Kamm, Managing Director – Capital Markets, Capital Guidance, USA

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1520 Investing in-and generating income from-private islands

Moderator:

Michael von Stumm, Senior Advisor to Kurt A. Engelhorn, Spain

Speakers:

Olaf Lock, Director of Travel, Vladi Private Islands, Germany

1600 Has the ship sailed on distressed opportunities?

- Where can you still find undervalued assets?
- Financing through debt – the opportunities and challenges
- Effective due diligence in distressed markets - determining if the fundamentals are there
- Challenges to repositioning an asset – innovation in real estate

Speakers:

Alex Cuppage, Managing Director, AFB Zurich AG, Switzerland

David Lladro, Chief Executive Officer, Invertige, Spain

1630 Close of forum and networking drinks reception

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