

# World Family Office Forum | Europe

**8-9 June 2026**

Fairmont Le Montreux Palace Hotel,  
Montreux, Switzerland







# The Event

*The World Family Office Forum | Europe is an exclusive business event, uniting the region's leading business families and single family offices.*

## A Private Forum for Thoughtful Exchange

The sixth edition of the summit brings together an exceptional community of family principals, family office leaders, and trusted advisors for in-depth dialogue on the most pressing challenges and opportunities facing families today. From navigating succession and governance to exploring new frontiers in investment and innovation, every session is designed to spark meaningful conversations and actionable insight.

Built around closed-door discussions, private roundtables, and informal networking, the forum creates a trusted environment where families can speak openly, share experiences, and form lasting partnerships.

Hosted by Connect Group, a long-established global leader in family office events, the forum blends international perspectives with a distinctly European lens. The event maintains a deliberately high ratio of family offices - with at least 70% of participants representing families or their offices - ensuring a peer-led atmosphere and conversations grounded in shared experience and long-term priorities.

Whether you're seeking strategic insight, or simply new connections with your peers, the World Family Office Forum | Europe offers a rare opportunity to engage and learn.





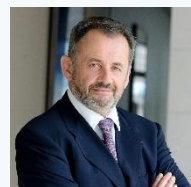
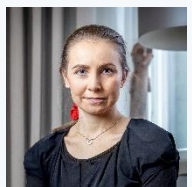

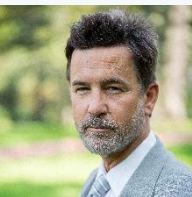





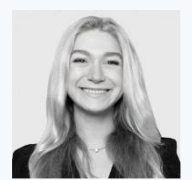




# Shaping the Conversation

Each edition of the event features a carefully curated lineup of speakers and respected partners from across the family office and investment world.

Speakers which have contributed to this event include:

	<p><b>Guillaume Sarkozy</b></p> <p>Founding Member &amp; Chairman <b>GSNB Conseil</b></p> <p>SINGLE FAMILY OFFICE</p>		<p><b>Iida Miettinen</b></p> <p>Deputy Chairwoman <b>Ensto</b></p> <p>FAMILY BUSINESS</p>
	<p><b>Sally Tennant OBE</b></p> <p>Founder <b>Acorn Capital Advisors</b></p> <p>ADVISOR</p>		<p><b>Ulrich Schmid-Maybach</b></p> <p>Founder &amp; President <b>The Maybach Foundation</b></p> <p>FOUNDATION</p>
	<p><b>H.S.H. Carl-Eduard, Prince of Bismarck</b></p> <p>CEO, <b>Bismarck Family Office</b></p> <p>SINGLE FAMILY OFFICE</p>		<p><b>Giorgiana Notarbartolo</b></p> <p>Impact Investor <b>PFC Family Office</b></p> <p>SINGLE FAMILY OFFICE</p>
	<p><b>Lisa Bosbach</b></p> <p>CEO <b>Cramer Capital</b></p> <p>SINGLE FAMILY OFFICE</p>		<p><b>Ian Prideaux</b></p> <p>Former Chief Investment Officer <b>Grosvenor Family Office</b></p> <p>SINGLE FAMILY OFFICE</p>
	<p><b>Luca Mentasti</b></p> <p>COO, <b>Nuova Energia Holdings (Loro Piana Family Office)</b></p> <p>SINGLE FAMILY OFFICE</p>		<p><b>Pauline Cuilleret</b></p> <p>Board Member &amp; Principal <b>Single Family Office</b></p> <p>SINGLE FAMILY OFFICE</p>

# Why Attend

The World Family Office Forum I Europe is a private gathering of the region’s most influential family offices, principals, and investment leaders - designed for real conversation, relationship-building, and strategic insight.

- ✓ **Connect with the Right People**  
Meet fellow family principals, family office leaders, and trusted advisors from across Europe - all carefully curated for quality and compatibility.
- ✓ **Lead with Purpose and Legacy**  
Explore how to navigate the complexities of family wealth - from defining purpose and preserving legacy, to managing complex family dynamics.
- ✓ **Mobilise Capital for Good**  
Learn how to align capital with conscience through philanthropy, sustainability, and impact investing - using wealth to shape a better future.
- ✓ **Invest with Insight & Foresight**  
Hear from experienced CIOs, VCs, and asset managers on emerging themes, sector trends, and managing risk in a complex macro environment.
- ✓ **Build Meaningful Relationships**  
Engage in private, off-the-record conversations, interactive sessions, and shared experiences that foster trust and long-term collaboration.

# Event Partners

**Partner With Us**

We collaborate with a small number of organisations to support the quality, depth, and relevance of our family office discussions.

[Contact us today](#)

# Mon 8 Jun

08:00 - 09:00

## Registration & Light Breakfast

09:00 - 09:10

## Chairman Welcome Remarks

09:10 - 09:50 | Panel Discussion

## The Business of Family: Governance, Capital and Continuity

This opening panel explores how wealth, governance, and decision-making operate as an integrated system within family enterprises and family offices. The discussion examines how family dynamics, control structures, and capital strategy interact in practice, and how families can thoughtfully evolve their operating model as scale, ambition, and generational involvement increase, without losing alignment or cohesion.

09:50 - 10:10 | Fireside Chat

## Wealth and Responsibility: Decision-Making at Scale

This fireside chat explores how significant wealth shapes responsibility, judgment, and decision-making at scale. The discussion reflects on how families balance discretion, accountability, and long-term thinking as capital, visibility, and expectations increase across generations.

10:10 - 10:50 | Keynote Presentation

## Macro Outlook: Investment Strategy for Family Capital

This panel examines how families and investment leaders can interpret the global macro environment and translate it into coherent investment strategy. The discussion focuses on judgement under uncertainty, capital allocation, and maintaining flexibility across varying family structures and objectives.

10:50 - 11:10 | Keynote Presentation

## Rethinking Equity and Fixed Income Allocation

This session examines how investors are reassessing the role of equities and fixed income in portfolios amid shifting market dynamics. The presentation explores allocation frameworks, risk considerations, and how public markets can be positioned to support portfolio objectives in changing conditions.

11:10 - 11:30

## Networking Break / One-To-One Meetings

11:30 - 12:30

## Roundtable Discussions

**Table 1:** Public Markets in a High-Rate World

**Table 2:** European Private Equity: Still a Strong Bet?

**Table 3:** Private Debt: Finding Yield and Managing Risk

**Table 4:** Venture Capital: How to Access the Best Deals

12:30 - 14:00

## Networking Lunch

14:00 - 14:50 | Panel Discussion

## Global Venture Capital Trends: The Shifting Landscape and What Family Offices Need to Know

This session will explore the current state of the global venture capital market, examining key trends and emerging opportunities that family offices should consider when looking to deploy capital. The discussion will focus on how venture investing is evolving, the sectors gaining momentum, and strategies to optimize returns while managing risk in today's market.

14:50 - 15:10 | Keynote Presentation

## Tech Disruption: What's Next for Investors?

Exploring how cutting-edge innovations are reshaping industries and where family offices can find the next big winners.

15:10 - 15:30 | Keynote Presentation

## Global Healthcare: Where Are the High-Growth Markets?

Identifying key trends driving healthcare investments, from biotech breakthroughs to digital health, and where to focus.

15:30 - 16:00 | Fireside Chat

## The Power of Networks & Co-Investing

Beyond capital, how can family offices leverage their networks to access top-tier private deals, reduce risk, and drive returns?

16:00 - 16:40 | Panel Discussion

## Digital Assets: Risk, Structure, and Portfolio Fit

This discussion examines digital assets through a risk and portfolio construction lens. Speakers explore how families assess volatility, liquidity, custody, and regulatory considerations, and how digital assets are positioned - or deliberately excluded - within family portfolios.

16:40 - 17:00 | Keynote Presentation

## Web3, DeFi & the Next Evolution of Financial Services

Exploring how Web3 and DeFi are transforming financial services, enabling decentralization, new investment opportunities, and redefining traditional banking.

19:00 - 22:00

## Networking Cocktail Reception & Gala Dinner at La Terrasse du Petit Palais with Special Entertainment

Enjoy cocktails and dinner on the beautiful Terrace de Petit Palais, overlooking the majestic Alps and Lake Geneva.

# Tue 9 Jun

08:00 - 09:00

## Networking Breakfast

09:00 - 09:30 | Fireside Chat

## Why We're Here: Defining Purpose as a Family

This fireside chat explores how to define shared purpose beyond wealth. The discussion reflects on values, identity, and contribution, and how families align individual aspirations with a collective sense of direction across generations.

09:30 - 10:10 | Panel Discussion

## Impact Investing: Intent, Return, and Accountability

This panel explores impact investing as a distinct approach to deploying capital with both financial and social objectives. Speakers will discuss how families can effectively define intent, set return expectations, measure outcomes, and integrate impact these investments within broader portfolios while maintaining discipline and accountability.

10:10 - 10:30 | Keynote Presentation

## Climate Solutions: Technology, Infrastructure, and Impact

Insights on deploying capital across climate tech and infrastructure, covering sourcing, structuring, and integrating impact-focused investments into broader portfolios

10:30 - 11:10 | Panel Discussion

## Investing in Real Estate: Direct, Funds, and Alternatives

This panel examines how family offices can approach real estate as a core component of long-term portfolios. Speakers discuss the merits and trade-offs of direct investments, funds, and alternative structures, strategies for sector and geographic diversification, and ways to balance liquidity, risk, and returns while complementing broader capital allocation.

11:10 - 11:30 | Keynote Presentation

## Unlocking Value in Logistics and Industrial Real Estate

Insights on logistics and industrial real estate, covering sourcing, risk management, and strategies for long-term returns.

11:30 - 12:10 | Panel Discussion

## The Future Family Office: Leadership & Strategy

This closing panel looks ahead at how family offices can evolve to meet the challenges of the next decade. Speakers will share insights on operational excellence, leadership models, technology adoption, and strategic planning, providing actionable guidance for executives seeking to make their family office more resilient, agile, and future-ready.

12:10 - 12:20

## Closing Thoughts from the Summit Chair

The Summit Chair looks back on the discussions of the two days sharing his key takeaways.

12:20 - 14:00

## Networking Lunch

Enjoy the closing lunch on the Terrasse du Petit Palais.

14:00 - 16:00

## Special Event - Lavaux Vineyard Tour & Wine Tasting

Explore the UNESCO-listed terraces of Lavaux on our vineyard tour & wine tasting event. Wander through the vineyards that boast breathtaking views of Lake Geneva and the Alps, while learning about the area's unique winemaking traditions from our knowledgeable guide. The experience concludes with a wine tasting, allowing you to sample a selection of the region's celebrated wines. This event offers a perfect blend of natural beauty and cultural heritage, inviting you to discover the essence of Lavaux's UNESCO-protected landscapes.



# Let's Connect

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