

World Family Office Forum | Europe

8-9 June 2026

Fairmont Le Montreux Palace Hotel,
Montreux, Switzerland





The Event

The World Family Office Forum | Europe brings together the region's leading business families and capital stewards in a private, invitation-only environment.

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 dialogue.

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

Hosted by Connect Group, a long-established global leader in family office events, the forum blends international perspectives with a distinctly European lens. The audience brings together families and their offices alongside a small, carefully selected mix of trusted contributors and partners, fostering a peer-led atmosphere and conversations grounded in experience.

Whether you're seeking strategic insight, or new connections with your peers, the World Family Office Forum | Europe offers a rare opportunity to engage, learn, and take away practical ideas and relationships that can shape the future of your family office.

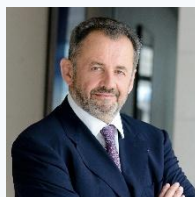




Shaping the Conversation

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 previously contributed to this event include:



Guillaume Sarkozy

Founding Member & Chairman
GSNB Conseil

SINGLE FAMILY OFFICE



Iida Miettinen

Deputy Chairwoman
Ensto

FAMILY BUSINESS



Sally Tennant OBE

Founder
Acorn Capital Advisors

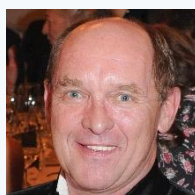
ADVISOR



Ulrich-Schmid Maybach

Founder & President
The Maybach Foundation

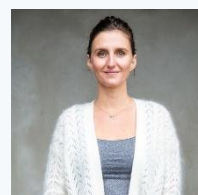
FAMILY FOUNDATION



**H.S.H. Carl-Eduard,
Prince of Bismarck**

CEO, **Bismarck Family Office**

SINGLE FAMILY OFFICE



Giorgiana Notarbartolo

Impact Investor
PFC Family Office

SINGLE FAMILY OFFICE



Lisa Bosbach

CEO, **Cramer Capital**

SINGLE FAMILY OFFICE



Ian Prideaux

Former Chief Investment Officer
Grosvenor Family Office

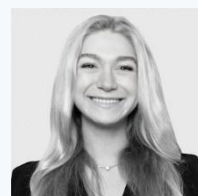
SINGLE FAMILY OFFICE



Luca Mentasti

COO, **Nuova Energia Holdings
(Loro Piana Family Office)**

SINGLE FAMILY OFFICE



Pauline Cuilleret

Board Member & Principal
Single Family Office

SINGLE FAMILY OFFICE

Why Attend

The event fosters open dialogue, trusted connections, and practical insight into the ongoing challenges of maintaining family wealth, safeguarding legacy, and navigating complex markets during turbulent times.

✓ 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

Event Chair Welcome Remarks

The Event Chair will welcome attendees and set the stage for the day, highlighting key themes of the upcoming event.

09:10 - 09:50 | Panel Discussion

The Business of Family: Governance, Capital and Continuity

This opening discussion explores how families can design effective governance structures, clarify roles, and strengthen oversight while preserving alignment and shared purpose. Speakers will examine how family dynamics, control structures, and capital stewardship interact in practice - and how to thoughtfully evolve your operating model as scale, ambition, and generational involvement increase, without losing cohesion.

09:50 - 10:10 | Fireside Chat

Trust, Influence & Generational Transition

Beyond governance, continuity relies on trust and credible leadership. This discussion explores how multi-generational families manage authority, differing perspectives, and transitions while preserving unity and long-term direction.

10:10 - 10:50 | Panel Discussion

Family Capital in a Multipolar World

This panel examines how family offices should position capital in an increasingly multipolar world. As economic power, trade relationships, and geopolitical alliances evolve, leading investment figures will discuss how to interpret structural shifts versus short-term market noise, allocate across regions and asset classes, and build resilient portfolios in a fragmented world.

Panellists:

[Wouter Kneepkens](#), Partner, [Blauwpark Partners](#)

10:50 - 11:10 | Keynote Presentation

Public Markets in Focus: Insights for Strategic Allocation

Explore the forces shaping global public markets and learn actionable strategies for portfolio allocation & risk management.

11:10 - 11:30

Networking Break

11:30 - 12:30

Roundtable Discussions

Table 1: Public Markets in a High-Rate World

Table 2: Curiosity to Confidence: Investing in Digital Assets

[Karl Naim](#), Group CCO & SEO Middle East, [XBTO](#)

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

Join fellow attendees in the elegant Salles des Fêtes for a relaxed yet inspiring networking lunch.

14:00 - 14:50 | Panel Discussion

Venture Investing: Strategy, Access and Risk

Venture capital remains selective: investment totals are strong, but deal volumes are down, exits are uneven, and fundraising is competitive. Family offices must navigate this environment carefully to capture high-quality opportunities, manage risk, and align with founders. This session explores how investors structure venture allocations, access top-tier deal flow, and build resilient portfolios in a concentrated 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 we leverage our 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 to assess volatility, liquidity, custody, and regulatory considerations, and how digital assets should be positioned within family portfolios.

16:40 - 17:00 | Keynote Presentation

Web3, DeFi & the Next Evolution of Financial Services

17:00 - 19:00

Pause & Recharge

A brief pause to refresh, unwind, and prepare for the Networking Cocktail Reception & Gala Dinner.

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

Family Legacy: From Principles to Practice

Family legacy extends far beyond wealth or business success. This session explores how we can preserve culture, values, and identity across generations and prepare successors to carry forward the family's story. Gain insights into the practices and principles that support families in guiding future generations while navigating the challenges of evolving times.

09:30 - 10:10 | Panel Discussion

Impact and Purpose: Deploying Capital with Intent

Creating meaningful impact often goes beyond simply giving or investing - it requires intentional strategies that carefully balance priorities and integrate purpose across all forms of capital. This panel explores how we should think about philanthropy, sustainability initiatives, and impact investing, and how to weigh competing objectives, measure results, and embed purpose-driven capital into broader strategies - all while aligning with family values and balancing the financial considerations.

Moderator:

Dr. Falko Paetzold, Managing Director, Centre for Sustainable Finance & Private Wealth, University of Zurich

10:10 - 10:30 | Keynote Presentation

Climate Solutions: Technology, Infrastructure, and Impact

Explore how innovative technologies and sustainable infrastructure are shaping the future of climate action.

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

Discover strategies to maximize returns in logistics and industrial real estate, exploring market trends, investment opportunities, and value-creation approaches.

11:30 - 12:10 | Panel Discussion

The Future Family Office: Structure & Strategy

This closing panel looks ahead at how family offices can evolve to meet the challenges of the next decade and beyond. 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 strategically future-ready.

Panellists:

Carlota van de Koppel, Partner & COO, Bedrock Group

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.

Highlighted Event

Mon 8 Jun | 19:00 - 22:00

Networking Cocktail Reception and Gala Dinner at La Terrasse du Petit Palais

Join us for an evening of networking and celebration at the stunning La Terrasse du Petit Palais. Connect with fellow family office principals, peers, and speakers over drinks and dinner, while enjoying exceptional cuisine and spectacular views.



Venue: La Terrasse du Petit Palais, Montreux
Dress Code: Cocktail / Smart Evening Wear

All Forum participants are welcome to join the cocktail reception and gala dinner.



Carlota van de Koppel

Partner & COO
Bedrock Group

Carlota van de Koppel is a Partner and the Chief Operating Officer at Bedrock, a multi-family office with operations in Switzerland, England, Monaco, and Portugal. As COO, she works closely with the executive and management teams to strengthen operational resilience, data governance, and long-term strategic planning across the firm's multi-jurisdictional platform. Her work focuses on fostering a high-performance culture, developing business-intelligence capabilities, enhancing cybersecurity, and refining governance frameworks that support informed, action-oriented decision-making. Since joining Bedrock in 2016, Carlota has supported cross-functional initiatives to evolve the organisation's operating model, corporate culture, talent management, and CSR efforts. Drawing on earlier experience in entrepreneurship and as a Chief-of-Staff, she brings a multidimensional, forward-looking perspective to the changing needs of modern family offices. Carlota completed a BSc in Business Management at King's College London and a MSc in Management, Organizations, and Governance at the London School of Economics.

Organisation Type:
Multi Family Office

9th June
11:30 - 12:10

Panel Discussion:

The Future Family Office:
Structure & Strategy



Wouter Kneepkens

Partner
Blauwpark Partners

Wouter is a founding partner at Blauwpark Partners. After completing three master's degrees in finance, he started his career as an investment banker, before transitioning into an activist hedge fund and completing a brief stint in private equity afterwards. During and post his INSEAD MBA, which he completed with distinction, he founded a number of tech startups and started angel investing. While the startups largely floundered, he had a lot of success as an angel, making notable seed-stage investments in Coinbase, Instacart and Gitlab.

In 2019, Wouter founded Blauwpark Partners, an off-shoot of the Blauwpark single-family office he had been leading since 2011. He has been responsible for the firm's strategic asset allocation for the last 13 years, investing across all asset classes in an endowment style strategy. Next to a significant allocation to liquid equities, Wouter oversees a portfolio with c.60% exposure to private markets. With his team, he allocates to around 20 private markets funds, the bulk of which in private equity, annually - in a global mandate.

Organisation Type:

Single Family Office

8th June

10:10 - 10:50

Panel Discussion:

Family Capital in a Multipolar
World



Dr. Falko Paetzold

Managing Director

Centre for Sustainable Finance & Private Wealth, University of Zurich

Dr. Falko Paetzold founded and leads the Center for Sustainable Finance and Private Wealth (CSP) at the Department of Finance of the University of Zurich. CSP has offshoots in Singapore and San Francisco, and spun-out of the Impact Investing for the Next Generation training program that Falko co-initiated at Harvard University. He holds impact advisory board seats at Pictet, ZKB, and other finance organizations. Falko was a Fellow at Harvard University, PostDoc at MIT Sloan School of Management, Sustainability Analyst at Bank Vontobel, Partner at sustainable investing consultancy Contrast Capital, and assistant professor at EBS University. Falko holds a PhD from the University of Zurich and an MBA from the University of St. Gallen (HSG) in Switzerland.

Organisation Type:

Academic Institution

9th June

09:30 - 10:10

Panel Discussion:

Impact and Purpose:

Deploying Capital with Intent



Karl Naim

Group Chief Commercial Officer & SEO Middle East
XBTO

Karl is a seasoned entrepreneur and investment professional with over 18 years of global experience spanning technology, venture capital, wealth management, asset management, and private equity. He held roles at UBS, Goldman Sachs, and Mubadala before becoming a full time start up entrepreneur in 2015, and founded 1 foodtech and 2 fintech startups. Karl currently serves as the Chief Commercial Officer at XBTO, where he leads the firm's global commercial strategy and growth initiatives. He also serves as the Senior Executive Officer of XBTO Middle East, based in Abu Dhabi Global Market (ADGM). He holds an MBA from London Business School.

Organisation Type:

Asset Manager

8th June

11:30 - 12:30

Roundtable Discussions:

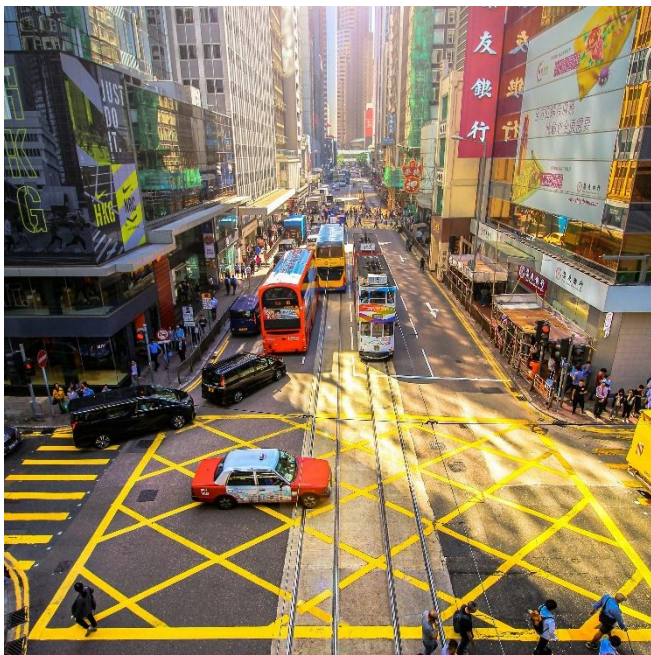
From Curiosity to Confidence:
Investing in Digital Assets

Join Us at Other Forums

The World Family Office Forum is a global series of private gatherings for family principals and family office executives. Each edition brings together a curated community to exchange insights, share experiences, and build meaningful peer relationships.

While every forum reflects the priorities of its region, the core philosophy remains consistent: peer-level dialogue, practical perspectives, and conversations that go beyond market commentary to address governance, leadership, impact, and long-term strategy.

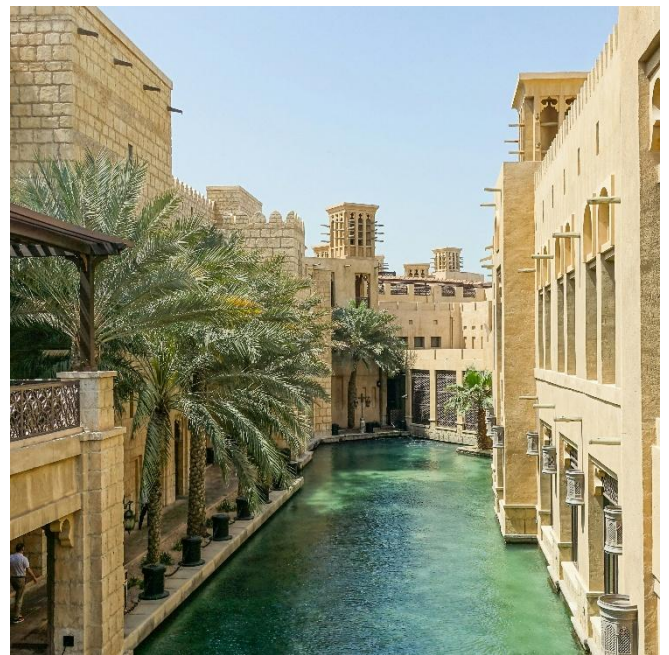
Join us at an upcoming edition and continue the dialogue.



World Family Office Forum | Asia

15-16 October 2026
The Ritz Carlton, Hong Kong

[Click here for the event website](#)



World Family Office Forum | Middle East

16-17 November 2026
Four Seasons Resort Dubai, UAE

[Click here for the event website](#)

Let's Connect

Connect Partners Limited

71-75 Shelton Street

London, WC2H 9JQ

United Kingdom

 [Website](#)

 [Blog](#)

 [Email](#)

 [LinkedIn](#)

connectgroup

