

# OMFIF Global Wealth Strategy Summit 2024

June 2024, London

# Shaping the future

## Next-generation connectivity



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**London, 18 June**

Join us for an exclusive event, 'Shaping the future: Next-generation connectivity,' where we delve into the transformative landscape of connectivity, innovation and leadership shaping the future generations of global families. This event is a unique opportunity to explore the emerging trends and technologies that will redefine connectivity in the next era.

Our commitment to providing unparalleled insights and fostering meaningful connections is rooted in the success of the Wealth Strategy Institute's 2022 global summit. The event set a new standard for excellence in wealth management gatherings and 'Shaping the future' seeks to build upon this success. With OMFIF's network of esteemed clients, partners and advisers, we aim to create an environment where global megatrends intersect with issues especially relevant to prominent families and their stakeholders.

### **Content highlights**

Our agenda is carefully curated to cover a spectrum of topics relevant to the contemporary challenges and opportunities faced by families of substantial wealth. From discussions on succession planning to insights into building robust infrastructure for effective wealth management, the event promises a rich tapestry of content and conversation.

### **Networking opportunities**

Beyond the presentations and panels, the event provides ample opportunities for networking. Engage with peers, industry experts and thought leaders during breaks, receptions and interactive sessions. Forge connections that extend beyond the event and create a network of support and collaboration.

### **Partnership opportunities:**

We invite organisations to explore partnership opportunities that align with the event's themes and objectives. As a partner, you will have the chance to showcase your expertise, engage with a select audience and contribute to the dialogue on shaping the future. Elevate your brand visibility, build meaningful connections and position yourself as a key player in the next era of connectivity.

The partners and their clients will also be invited to attend as OMFIF's guests at the highlight of the British social calendar – Royal Ascot 2024 – with an exclusive VIP suite in the Queen Anne Enclosure.

### **Who will be invited to attend**

Family representatives

Family office executives

Institutional and private investors

Wealth managers

Technology innovators

Thought leaders in connectivity and innovation

Industry professionals interested in the future of global connectivity

### **Looking forward**

'Shaping the future: Next-generation connectivity' will journey into the future of global family dynamics. Join the event as we navigate the evolving landscape of connectivity, innovation and leadership – shaping a path for the generations to come. Be part of an experience that will set the stage for a future where connectivity is not just a tool but a cornerstone of global family success.

# Event agenda



8:30 – 9:30 **REGISTRATION**

9:30 – 9:35 **WELCOME ADDRESS**

9:35 – 9:40 **OPENING KEYNOTE**

9:40 – 10:30 **SESSION I**

## **Expect the unexpected: the global economic environment explained**

A group of leading policy-makers and economists discuss the new global economic landscape, how long inflation will last, whether interest rates will remain higher for longer and how global markets are likely to react.

10:30 – 11:20: **Session II: Global family offices: adapting to connectivity challenges**

In an era marked by uncertainty, the imperative of safeguarding wealth, implementing effective risk management and crafting robust estate plans takes on heightened significance for prominent families. This underscores the evolving dynamics of wealth management in a world

undergoing rapid transformation. A group of single and multiple family office executives share experiences and strategies for leveraging connectivity in global wealth management.

11:20 – 11:50 **NETWORKING BREAK**

11:50 – 12:20 **FIRESIDE CHAT/GLOBAL PERSPECTIVE**

### **Challenges and opportunities in next-gen leadership succession across cultures**

Next-generation leaders will examine how leadership succession varies across different cultural contexts as well as the universal challenges and opportunities they face.

12:20 – 13:10 **SESSION III**

### **Next-gen connectivity, creativity and leadership**

The emerging generation is not merely adapting but actively spearheading the diversification of investment portfolios and expanding financial horizons. They are poised to serve as catalysts for progress in global phenomena such as artificial intelligence and sustainable investing, therefore shaping the trajectory of wealth management in an ever-evolving landscape.

13:10 – 14:30 **NETWORKING LUNCH**

14:30 – 15:20 **SESSION IV**

### **The global CIO debate: navigating the markets of today**

How should ultra-high-net-worth clients adapt their investment approaches in light of dramatically changed market dynamics? Is now the time to be bold or to take risk off the table? Should private markets be core to your portfolio or should you put a premium on liquidity? Which

alternative markets (such as art or wine) offer value? Is it time to diversify or stick to what you know? A panel of chief investment officers from top global banks discuss.

15:20 – 16:10 **SESSION V**

### **From digital disruption to technology transformation**

New technology has the power to transform how ultra-high-net-worth individuals not only manage their wealth, but also how they manage their relationships with their private banks. Leading technology providers mix with senior private bankers to plot a path to a dynamic, friction-free approach to wealth management, driven by the best in new technology.

16:10 – 16:30: **CLOSING REMARKS**

16:30 – 17:30: **NETWORKING RECEPTION**



# Investment budget



## Platinum partner

**\$85,000/€78,500/£68,500**

(plus VAT if applicable)

- Speaking slot in two panels of choice or one page and a keynote presentation (30-minute)
- Tailor-made closed-door symposium or roundtable
- Promotion video (maximum length five minutes) that will be played on main stage screen during registration and break time\*
- 15 representative summit passes for staff
- Unlimited guest invitations to the summit
- Top-line branding on all materials (summit brochure, agenda, landing page, marketing emails and social media posts)
- One page advertisement in the summit brochure (global distribution)
- Exhibition space of 2x3 metres\*
- Virtual booth
- Access to the summit VIP room
- Profile in the conference app
- Post-conference report and access to the delegate list
- Five complimentary VIP tickets to the OMFIF suite at the Royal Ascot 2024

## Gold partner

**\$55,000/ €50,000/£45,000**

(plus VAT if applicable)

- Speaking slot in one panel of choice or a keynote presentation (30-minute).
- Promotion video (maximum length two minutes) that will be played on main stage screen during registration and break time\*
- 10 representative passes for staff
- 50 guest invitations
- Second-line branding on all materials (summit brochure, agenda, landing page, marketing emails and social media posts)
- One page advertisement in the summit brochure (global distribution)
- Exhibition space of 2x3 metres
- Access to the summit VIP room
- Profile in the conference app
- Post-conference report
- Three complimentary VIP tickets to the OMFIF suite at the Royal Ascot 2024

## Silver partner

**\$30,500/€28,500/£25,000**

(plus VAT if applicable)

- Speaking slot in one panel of choice
- Five representative passes for staff
- 20 guest invitations
- Third-line branding on all materials (summit brochure, agenda, landing page, marketing emails and social media posts)
- Half page advertisement in the summit brochure (global distribution)
- Access to the summit VIP room
- Profile in the conference app
- Post-conference report

## Drink reception partner or lunch partner

**US\$ 30,500/EUR 28,500 /GBP 25,000**

(plus VAT if applicable)

- Five branded LED table cubes that will be displaced in the prominent positions during drink reception or lunch
- One product display table
- Logo on all materials
- Five summit passes





For more information, please contact:  
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