The Ton

Private Family Office Gathering

Thursday 2nd May 2024, Yacht Club de Monaco, Monaco

Debrecks

Bondi Partners

Wiston Capital

Diego Garrigues Aviation Law

Chateau Musar

Zennor Asset Management

Wealtheon Asset Management

Committed Capital

Cecil Wright

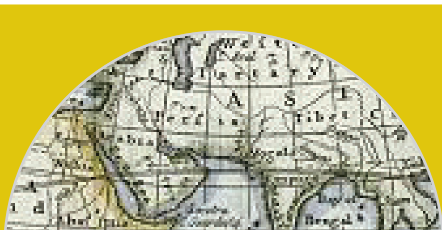
Voluxis

MFSA Malta Financial Services Authority

Colibri Aircraft Brokerage and Asset Advisory

Bainbridge Partners Disciplined Alpha Generation

fintuity



Integrity. Trust. Connection. The Ton.

Seig de Vater

Fellow of the Chartered Institute for Securities & Investment

CONNECTING DYNAMIC ENTREPRENEURS WITH EXPERIENCED INVESTORS

Private investment roadshows and bespoke events in Europe, Africa (Mauritius), Asia and Australia.

Relationships with more than 800 families.

Raised in excess of US$ 4 billion for a wide variety of investment strategies and companies.

Debrecks brings most interesting investment ideas to a broad range of private investors and family offices.

- Seig is a Fellow of the Chartered Institute for Securities & Investment (FCIS) and has over 25 years of experience with Family Offices in the UK. Starting with Cazenove & Co., (12 years) he looked after Family Office funds and companies, and built relationships with over 500 families.
- In 2000, Seig founded Debrecks Marketing through the Family Office network in Europe, the Middle East, the Far East, and Australia.
- DeBrecks offers an introductory service either one-to-one, or a full marketing campaign in the UK and Europe.
- Debrecks has raised in excess of US$4 billion for various investment strategies, including ABL, European long/short, MENA long/short, Africa funds, global macro, long only boutiques, Multi-managers (UK), Fund of Funds, Green Funds, and Private Equity.
- In 2004, Seig founded a service to visit and meet with the family offices of Australia and the Super Funds (Pension Funds). In excess of 20 managers representing different strategies have visited and raised money.
- In 2005, Seig also founded the European Family Office Investment Forum. He launched the first Leadership Summit and Investment Summit in London and continues to run these events with Incisive Media. The events have become increasingly successful in terms of numbers (over 300 families attend each event), and in terms of raising money for different ideas and funds through presentations to the Family Office audience.
- In 2011, Seig was appointed Chairman of FMG Eurasia, which specialises in frontier funds, Iraq, MENA, Russia, China, India, and Africa. As Chairman, Seig facilitates distribution in Europe for FMG.

YOU’RE IN GOOD HANDS HERE - AS A FAMILY-OWNED BUSINESS AND ACTIVE IN THE FINANCIAL SECTOR, WE ASSIST THOSE WHO WISH TO INVEST, TO MAKE AN INFORMED DECISION BETWEEN GROWTH AND VALUE INVESTING, ALLOWING THEM TO REALIZE THEIR FINANCIAL OBJECTIVES.

TALK TO US

With more than two generations of experience in asset management, we dispose of a lot of knowledge to advise you. Whether it’s for your family office, active estate planning or inheritance, we would love to hear about your situation!

ASSET MANAGEMENT
Wealtheon

www.wealtheon.ch / info@wealtheon.ch / +41 (0)22 320 4740

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Agenda

Welcome | Seig de Vater, The Ton

Keynote | Bondi Partners

The Hon. Ambassador Joe Hockey (Ret.), Global President and Founding Partner
Before co-founding Bondi Partners, Joe served as Australia's Ambassador to the United States of America, taking up his posting in Washington in January 2016. Notably, Joe was responsible for Australia's relationship with the U.S. during the final year of President Obama's tenure and the first three years of President Trump's term. As Ambassador, Joe emphasized the importance of a free and fair trade and investment partnership between the U.S. and Australia, while promoting innovative infrastructure investment throughout America.Previously, as the elected Treasurer of Australia, Joe was responsible for all aspects of the Australian economy, helped shape the modern financial system in Australia and chaired the highly successful G20 Finance Ministers and Central Bank Governors meetings in 2015. Joe was an elected member of the Australian Parliament for more than 20 years and was appointed to numerous Cabinet roles including Minister for Workplace Relations and Minister for Human Services. At Bondi Partners, Joe spearheads the firm's global strategic direction, identifies emerging investment opportunities and leads negotiations on mergers and acquisitions.

Presentation One | Malta Financial Services Authority (MFSA) – 'Malta: Family Offices – A regulatory perspective'

Mr. Joseph Zammit-Tabona (FCA, CPA, FIA, FMIT, MOM, KM). Founder & Chairman, Malta Business Network
Chairman of Malta Financial Services Advisory Council developing Malta's financial services strategy by bringing together financial services, private sector, and regulators (MFSA, MTCA, FIAU, and MBR) with a focus on implementing 50/70 of 175 initiatives within 2024. Director of the Klesch Group Ltd; active on a number of Boards of Directors; Chairman of Valletta Cruise Port plc and Tigne Mall plc. Served as Chairman-Malta Stock Exchange, FinanceMalta and Viset Malta/Valletta Cruise Port plc., active Board Member-Bank of Valletta, MCAST, HSBC Life Assurance (Malta) Ltd; President-Federation of Industry (90-92, 2000-03); Chairman-Accountancy Board. 1997 conferred the significant order of a knighthood of Magistral Grace by the Sovereign Hospitalier Order of St. John of Jerusalem of Rhodes and Malta. Appointed Member of the Order of Merit. Lifetime Achievement Award, Malta stock Exchange. Certificate of recognition (50yrs membership-Institute of Chartered Accountants in England & Wales). Appointed Malta's High Commissioner to the United Kingdom and Northern Ireland presenting Letters of Credence to Her Majesty Queen Elizabeth II in 2009. Non-resident Ambassador-Republic of Ireland. Founding Chairman-Malta Enterprise (amalgamation of Malta Development Corporation, Malta External Trade Corporation, Institute for the Promotion of Small Business). An accountant by profession, Joseph retired from active practive as Senor Partner in 2000 from PricewaterhouseCoopers.

Michael Xuereb, Chief Officer Strategy, Policy and Innovation, MFSA
Michael is Chief Officer Strategy, Policy and Innovation at the Malta Financial Services Authority. He joined the MFSA in 2000, heading several departments throughout the years, more recently as director regulatory development and financial stability. Among other appointments in the public sector, he previously headed the management team at Malta's inward investment agency and served as counsel within the Attorney General's Office. He holds a master's degree in financial services and Doctor of Laws degree from the University of Malta.

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Presentation Two | Wealtheon Asset Management

Victor Zwart, Founder & CEO
Victor founded Wealtheon Asset Management in Geneva in 2005. The company expanded into Belgium and The Netherlands in 2008 and in 2020, acquired Torrebos, an independent investment advisor in Belgium. Today the Wealtheon Group is offering Growth, Value and High Conviction strategies to over 400 (U)HNWI families. Victor started his finance career in New York in 1996, and later moved to Eindhoven, Amsterdam and Geneva. Victor co-founded the Wealtheon foundation, a charity that supports small and midsize charities who aim to improve the lives of children and young adults. Victor is a WWF ambassador and committee member of HRW Belgium.

John-Patrick Broekhuijsen, Managing Director
John-Patrick Broekhuijsen is a seasoned asset manager and former banker, active in the financial business for more than 30 years. After he set-up and managed two branches for the Dutch-Belgian private bank Van Lanschot Bankiers in Belgium between 1995 and 2008, he moved to Geneva, Switzerland where he became subsequently member of the management team at BNP Paribas Wealth Management and Bank Sarasin. In 2014 he was asked by Peter and Victor Zwart (founders and sole shareholders at Wealtheon) to join the Wealtheon Group. John-Patrick is member of the Management and Investment Committee at the Wealtheon Group and Managing Director of the Swiss office. He acts as a trusted advisor for several, internationally based UHNWI families, some of them already for the second & third generation.

Presentation Three | Wiston Capital – 'Why Bitcoin? Why Now?'

Charlie Erith, Founder & Fund Manager
Charlie has 30 years' experience in financial markets. The first half of his career was spent at Cazenove in equity research and sales. The second half has been in Fund Management, where he initially specialised in Asian equities, running both long only and long/short portfolios for Boyer Allan, Stone Drum and Coupland Cardiff Investment Management, with a particular focus on smaller companies. Charlie started researching bitcoin and digital assets full-time in 2020, when he set up and was CEO of ByteTree Asset Management. He was responsible for launching both the Bitcoin & General Fund in 2021 and the 21Shares ByteTree BOLD ETP a year later. Wiston Capital was established in 2023 to focus entirely on the emerging opportunity in digital assets. Charlie is the sole shareholder.

Presentation Four | Cecil Wright – 'An Introduction to Cecil Wright'

Henry Smith, Sales Broker
As a founding partner, Henry Smith heads up Cecil Wright & Partners' Monaco office. His family background in banking and finance provides an invaluable analytical mindset to the business. This sees Henry routinely conduct pricing and market analysis specific to client requirements. With his encyclopaedic knowledge of yachts and technology he ensures the team are always on top of industry news and trends; and that client's yachts are well exposed to the market.

Presentation Five | Voluxis Limited

George Rolls, Chairman
George has over 30years experience in various aviation related executive and non-executive roles, past positions include directorships with private jet operators Hangar 8 plc and Gama Aviation plc in addition to being chairman of charter broker Privatefly and aircraft presentation company Up&Away. With an overarching focus on safety, George's prime role is to ensure delivery of a superlative service to owners and users of the Voluxis fleet whilst working to manage all aircraft to the highest standard whilst maintaining asset value.

Agenda

Presentation Six | DG Aviation Law

Diego Garrigues, Founder
Diego's experience extends for over 20 years in Aviation handling aircraft financing, purchase and sale transactions for airlines, lenders, high net worth individuals and operators and project managing aircraft and fleet acquisitions from contract negotiation to delivery. Diego qualified as a Spanish Abogado in 2000 and as an English Solicitor in 2009. He trained and spent 5 years at Iberia Airlines in Madrid, as legal counsel where he gained considerable experience with the airline in multijurisdictional work. Diego moved to London in December 2007 into private practice and has since then advised to clients on ownership and operating structures, negotiating and drafting loan, lease and purchase agreements, security documentation and all ancillary documentation, including registration applications, legal opinions and conditions precedent for delivery, insurance and escrow arrangements. In addition, Diego has extensive experience in regulatory, commercial dispute resolution, corporate law and commercial agreements, including aircraft completion contracts, operating leases and maintenance contracts.

Presentation Seven | Colibri Aircraft

Oliver Stone, Managing Director
Oliver is the Managing Director for Colibri Aircraft, a private aircraft brokerage and asset advisory firm based in London. His focus has been on the international arena, remarketing and purchasing aircraft for clients, as well as advising lenders on asset value protection and repossessions. He has bought and sold aircraft for customers in Asia, South America, Europe, the Middle East and the US, giving him a first-hand perspective on different cultures and their approach to private aviation, the demand for such aircraft around the world, and the nuances involved in trans-national aircraft transactions.

Presentation Eight| Committed Capital Limited / Committed Capital Financial Services Limited

Steven A. Harris, CEO
Steve joined Committed Capital in 2004 as the CEO and has over 30 years' experience in investment and corporate development, covering investment, takeovers, strategic alliances and fundraisings both as principal and agent. He leads the investment and fund management teams at Committed Capital and is Investor Director for various investee companies in our portfolio. Initially a Corporate Financier at HSBC, Steve became a Director in the London Corporate Finance Department of Société Générale. Later, as Head of M&A at PA Consulting, Steve developed their post-merger integration and joint ventures offerings. In the early years of the internet, Steve was Investment Director at Antfactory, a start-up internet incubator, which grew to become one of the largest UK internet investment vehicles; he was also finance director of its investment banking division. Steve holds an MBA from London Business School and a BA Hons in Modern History. Steve attended the Royal Military Academy Sandhurst and was an officer in the British Army.

Presentation Nine | Fintuity Limited

Dr. Anatoly Gorlov, Co-Founder
A serial entrepreneur with proven track record in fin-tech focusing on investor relations and business development. Prior to starting Fintuity and Monte Digital Anatoly had a successful career in investment banking at JP Morgan and BNP Paribas CIB, later joined a quant hedge fund which he left for a single-family office where he co-managed a liquid portfolio of EUR 0.5 B. Anatoly set-up two Luxembourg-based funds and is looking to set up a new fund which will be used to support Fintuity's acquisitions of IFAs in the UK and EU. PhD in Economics, MSc in Finance, BSc in Banking in Finance (London School of Economics).

Pavel Poloskov, Co-Founder
Visionary entrepreneur with a deep-rooted passion for integrating technology into the financial sector. After more than 15 years of experience in leading investment management and financial advisory companies Pavel's aim is to revolutionise financial services to make them more accessible and user-friendly. Strategic vision and product-driven experienced professional. Master in Theoretical Physics, specialising in Mathematical Methods in Finance. This unique blend of practical experience and advanced education fuels Pavel's passion for building technology-driven financial businesses.

Agenda

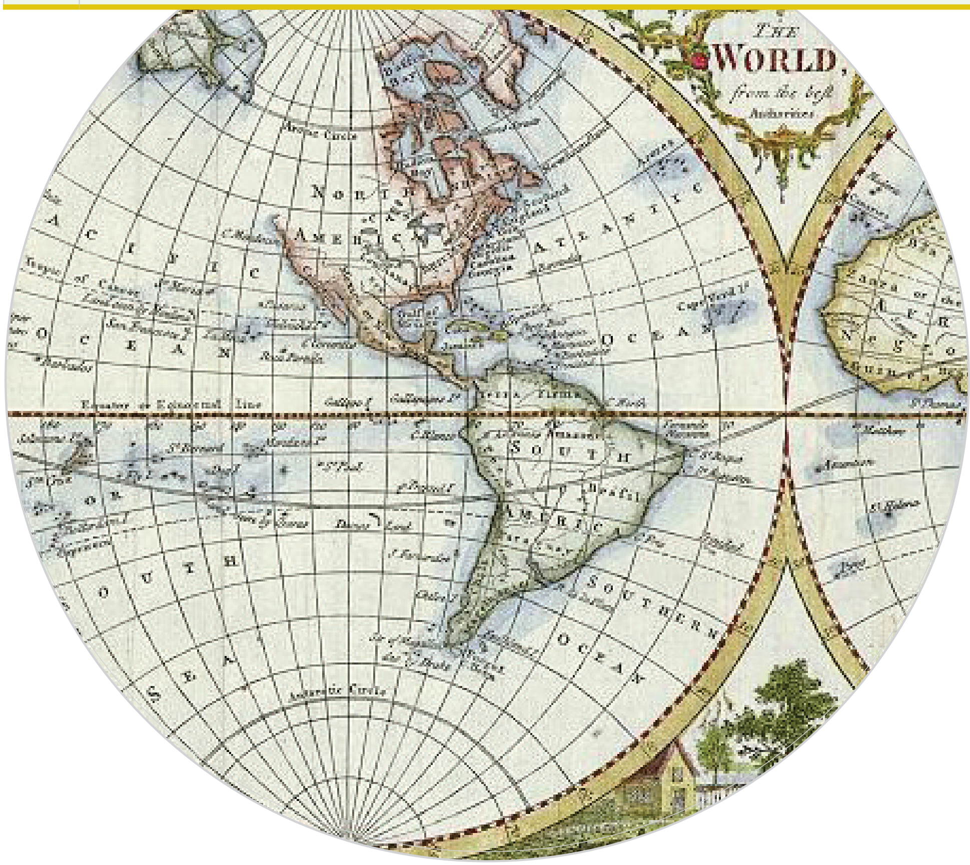
Presentation Ten | Bainbridge Partners

Antoine Haddad, CEO & Chief Investment Officer
Haddad founded Bainbridge Partners in 2002, an award-winning, multi-manager platform, managing over $1.2 Billion in assets in various asset classes for corporate pensions, insurance companies and Private HNW clients. Previously; Economic Analyst and a Trader with the Louis Dreyfus Corporation's Futures (maintaining all their domestic corn 'basis trading' book in the South East Region of the US) and Cash Grain Trading Division. In 1993 joined Millburn Corporation, a Hedge Fund (CTA) with approximately $1 billion in client assets as a Trader, becoming responsible for all futures and options execution in the European and the Asian markets. His options trading later led him to start a Structured Products desk at Millburn. As Head of Structured Products (96-01), Mr. Haddad established partnerships with four leading global institutions in both Europe and the US to structure, manage and place over $100 million in "Managed Futures" linked securities (Swaps, Options, CDOs, etc.). Graduated with Highest Distinctions from the University of Virginia (1989) - Bachelor of Science degree in Electrical Engineering. Haddad later received a Master of Science in Electrical Engineering from the University of Michigan in 1990, with a specialization in Digital Signal Processing and Communications.

Presentation Eleven | Château Musar

Marc Hochar, Family Proprietor
Marc Hochar is the 3rd generation member of the Hochar family running Chateau Musar. He has always been passionate about wine, but only got involved with the family winery in 2010 after a 20-year long career in investment banking and asset management. He is a member of the board of Chateau Musar, with responsibilities for international sales and marketing, and financial affairs. Together with his cousin Ralph in London and his brother Gaston who has been running the winery since the 90's, they continue the pioneering work started by their grandfather in 1930 in making fine wines renowned for their elegance and longevity.

Thank you and Closing Address | ***Seig de Vater, Founder, The Ton***

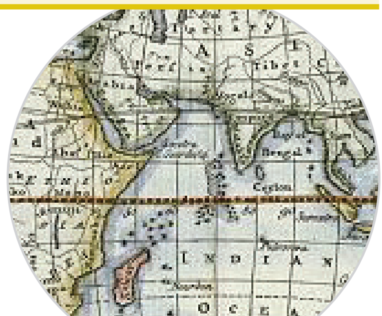


Speakers

Bondi Partners	Bondi Partners is an advisory and investment firm which sits at the critical intersection of policy, politics, and the private sector. It was founded in Washington DC in early 2020 by former Australian Ambassador to the United States, the Hon. Joe Hockey, to help elevate the trade and investment partnership between Australia, the US, UK and allies to the next level. From market entry to supply chain challenges, mergers and acquisitions to investment, Bondi Partners' builds a roadmap to success and shares the journey with you. In an increasingly complex world, where governments are becoming more deeply entrenched across all sectors and industries, we draw on our unique experience and networks to interpret, forecast and manage opportunities and risks for our clients. We put the puzzle together.
MFSA MALTA FINANCIAL SERVICES AUTHORITY	The Malta Financial Services Authority (MFSA) is the single regulator of financial services in Malta, covering banks, insurance companies, investment services, trusts and pensions. In 2018, the MFSA became the first European regulator to develop a framework to regulate virtual financial assets. The MFSA's mission, as enshrined in its Strategic Statement, is to enhance its position as an independent, proactive and trustworthy supervisory authority with the main purpose of safeguarding the integrity of markets and maintaining stability within the financial sector, for the benefit and protection of consumers. The MFSA licenses over 2,000 entities to operate in the financial services sector.
ASSET MANAGEMENT Wealtheon	Wealtheon is a family-owned, independent asset manager with roots going back over 50 years. Wealtheon is a knowledge-driven company with a history of co-investing alongside clients to achieve attractive risk adjusted returns over the long-term. They invest mainly in publicly listed, liquid companies and conduct a combination of top-down and bottom-up approaches. As an experienced and professional partner, they work very closely with their clients' families and advisors to ensure expectations are met to the highest quality. Wealtheon have offices in Belgium, The Netherlands and Switzerland.
Wiston Capital	Wiston Capital is a fund management company investing in crypto assets. The flagship fund is the Bitcoin & General Fund, which provides investors with liquid, long-only exposure to a selection of digital assets. Charlie Erith is the Fund Manager, and the research team comprises four consultant analysts. We also run an education course, to give investors an introductory understanding of blockchain technology and its usage. These courses are held monthly in Pratts Club in Central London. Prospective investors in the asset class are strongly encouraged to attend this informative and highly enjoyable format. Wiston Capital is based in the UK. Charlie Erith is approved by the FCA in his role as manager of the Bitcoin & General Fund.
CECIL WRIGHT	Cecil Wright & Partners is a boutique superyacht brokerage house specialising at the top end of the yacht market. The expert team provide a highly personal service to clients across the build, buying, selling, and chartering of large yachts. The company has a particular focus on northern European yachts over 60m and has developed a close working relationship with the most prestigious shipyards in the world, including Feadship, Royal Huisman and Lürssen. Formed in 2013, the company was founded on a central desire to offer the very best service and expertise in yacht brokerage; only achieved by focusing on building dedicated relationships with fewer, exceptional clients. With offices in London, Monaco, Jersey and Hampshire's New Forest, the team, many of whom have worked together for over 25 years, are perfectly placed to manage their clients' bespoke needs. www.cecilwright.com
VOLUXIS	Voluxis operates and manages corporate jets from renowned manufacturers including Gulfstream, Bombardier, and Embraer to the highest standards. With offices in the UK (Farnborough and Biggin Hill) and San Marino and aircraft based in the UK, Dubai and Singapore, our carefully selected team of aviation professionals are chosen to give the best level of service to our owners. Established 50 years ago, our commitment is to treat every aircraft as if it were our own, give accurate and timely financial reporting and where required place charter to help reduce fixed costs of ownership.

Speakers

DIEGO GARRIGUES AVIATION LAW	DG Aviation advises clients on ownership and operating structures, negotiating and drafting loan, lease and purchase agreements, security documentation and all ancillary documentation, including registration applications, legal opinions and conditions precedent for delivery, insurance and escrow arrangements. In addition, advise is provided in regulatory, commercial dispute resolution, corporate law and commercial agreements, including aircraft completion contracts, operating leases and maintenance contracts.
colibri AIRCRAFT BROKERAGE AND ASSET ADVISORY	Colibri Aircraft was founded in 2011 with the desire of bringing honest counsel to aircraft owners and operators. The team is based in London and represents a number of financial institutions, high net worth individuals and aircraft operators. Colibri has advised clients worldwide on aircraft of all sizes, from the Citation II to the Gulfstream G550.
COMMITTED CAPITAL	Committed Capital Limited is a Venture Capital business based in Belgravia, London and was established in 2001. The team's investment focus is on growth stage technology companies based in the UK and has a proven track record of working with and assisting these companies in creating value for shareholders. Since 2014 and the introduction of our flagship evergreen EIS Fund, eight exits have been completed out of the current cohort of investments, averaging 34.7% IRR and 2.9 times funds invested. This value is achieved through careful investment selection, rigorous due diligence, efficient transaction processes and providing investee companies with ongoing hands-on support. Committed Capital is currently establishing a £100m LP fund for growth stage technology investment
fintuity	We operate two businesses: Fintuity and Monte Digital. Established in Lodnon with a vision to democratise holistic financial advice, Fintuity provides a unique digital platform that connects clients with certified financial advisors offering tailored, accessible, and cost-effective financial planning. Fintuity is active in B2B and B2B2C offering white labelled tech and operational support to IFAs as well as financial advisory services to corporate employees.Monte Digital headquartered in Monaco, is a smart marketplace for wealth management products and services targeting mass affluent clients. Built-in AI-driven tools provide tailor-made individual guidance while the platform operates as a gateway to HFs, PEs and other opportunities currently not available to people with sub EUR 5 M liquid net worth. Active in B2C and B2B.
Bainbridge PARTNERS Disciplined Alpha Generation	Bainbridge Partners is a leading boutique investment firm based in London, specializing in providing tailored financial solutions to high-net-worth individuals and institutional clients. Founded in 2003, the firm has built a reputation for its bespoke wealth management services and expertise in the areas of Alternative Investments and Risk Mitigation Strategies. Bainbridge Partners has a team of seasoned investment professionals with decades of experience in the financial industry, who work closely with clients to understand their unique investment objectives and risk profiles. With a focus on delivering uncorrelated, liquid, high risk-adjusted returns through active management and a disciplined approach to investment selection, Bainbridge Partners has established itself as a trusted partner to its clients, helping them achieve their financial objectives.
Chateau Musar	Housed in an 18th century castle, Château Musar was founded in 1930 by Gaston Hochar inspired by Lebanon's 6,000-year winemaking tradition. The vineyards are located in the Bekaa Valley at an altitude of 1,000 meters and are certified organic since the mid-2000's. The wines are produced with a non-interventionist winemaking philosophy and are known worldwide for their finesse, elegance and extraordinary ability to age.

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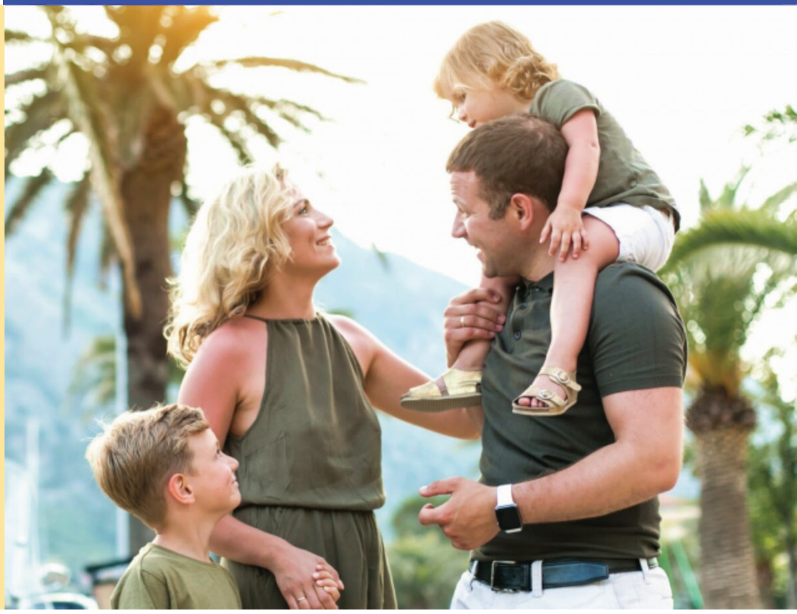
WINNER
SANTANDER X100 2022

WINNER
MONACO TECH WINNER 2024

Monte Digital

Monaco Digital family office & marketplace for clients with 0.5-3m who have no access to traditional private banking or family office services



Chateau Musar

Housed in an 18th century castle, Chateau Musar was founded in 1930 by Gaston Hochar inspired by Lebanon's 6,000-year winemaking tradition.

The vineyards are located in the Bekaa Valley at an altitude of 1,000 meters and are certified organic since the mid-2000's. The wines are produced with a non-interventionist winemaking philosophy and are known worldwide for their finesse, elegance and extraordinary ability to age.

Serge Hochar, Decanter's first ever Wine Personality of the Year in 1984, once said "the harmony of nature is better than anything we could ever create. It should be a priority to drink what is 'true' rather than what is 'good'; I once produced a wine that was technically perfect but it lacked the charms of imperfection".

The Ton | Private Family Office Event | Thursday 2nd May 2024, Yacht Club de Monaco, Monaco

for more information please contact
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