



# INTERNATIONAL FAMILY OFFICE SUMMIT

Female-Fit Family Offices:  
The Transitional Role of Family Offices



20 – 22 May 2025

*Welcome to the first International Family Office Summit: Female-Fit Family Offices, brought to you by LuciaDeKlein Private Office*

The International Family Office Summit: Female-Fit Family Offices provides a unique platform for meaningful dialogue among a diverse group of participants and influencers in the family office sector. The summit highlights the vital role of women and their evolving responsibilities in the face of a significant shift in wealth distribution. It also emphasizes the need for a focused approach to improve the future for women within the family office landscape, regardless of their roles.

The upcoming summit, set to last two and a half days, will focus on a pivotal theme: the transformative impact of wealth creation and its allocation to women and female-led family offices. According to Cerulli, it is projected that a total of \$124 trillion wealth will be transferred by the year 2048. Of this amount, \$105 trillion is expected to be allocated to heirs, while \$18 trillion will be designated for charitable purposes.

Furthermore, estimates regarding horizontal or intra-generational transfers suggest that \$54 trillion will initially be conveyed to spouses before eventually being passed on to heirs and charitable organizations. In family offices, the family balance sheet operates under unique dynamics and structures, highlighting the substantial influence of the matriarch.

This transition is expected to promote the adoption of sustainable practices within family offices and amplify the impact of private wealth on broader societal discussions. The summit aims to spotlight innovative solutions, foster connections among stakeholders across various sectors, and facilitate philanthropic discourse, addressing priorities essential to female-led family offices. Our founder believes that achieving these objectives relies on the support of the global family office network and cannot be accomplished in isolation.

In a 2024 study by Women in the Workplace, conducted in partnership with LeanIn.Org and McKinsey & Company, researchers reflect on the notable progress women have made in the workplace. However, many of their experiences remain the same or even worse than they were ten years ago. While this study does not directly address the role women play within family offices or their narratives surrounding family wealth, it emphasizes the need for corrective actions to address existing imbalances.

The report highlights that, over the past decade, companies have invested substantial resources in advancing women. Despite these efforts, the fragility of progress in this area underscores the necessity for further action. Although organizations have tried to engage managers and employees, the workplace culture appears stagnant. One clear takeaway is that achieving profound, systemic change, requiring shifts in mindsets and behaviors, is challenging and does not follow a straightforward path.

## Transition

There are significant differences in preferences among family members, and how family office transitions are managed has a profound effect on next-generation family office members when compared to those in current demographics. As preferences evolve, these distinctions are likely to impact market share and allocations, allowing for the accommodation of the needs of transitional family members.

## Impact

Our impact can be more substantial if family offices are established with a clear purpose and designed to be future-ready. Building stronger networks presents an opportunity for the female family office ecosystem to experience significant growth and development. By fostering relationships based on solidarity, we can create a supportive community. Throughout the summit, participants will embark on engaging and insightful days, journeying from Transition to Impact and ultimately to Sustainability.

## Sustainability

When there is a disruption in the usual flow of operations, it presents an opportunity to reevaluate the transition, its impact, and sustainability within the family office sector. This can be achieved through interactive discussions, networking, and knowledge sharing. Africa has the potential to lead in establishing female-friendly family offices, as we have been successfully implementing this behind the scenes for many years. Now is the time to reconnect with other families, enterprises, and industry leaders to solidify our legacy stories, explore new opportunities, and exchange insights on the latest developments in the global market.

## The journey and the switch

The journey toward disruption and innovation begins with an individual who must either choose to embark on an entrepreneurial path or join a family enterprise through professional or familial connections. When the founder or principal of this family narrative achieves success, establishing a family office can serve as a transformative factor, whether in its initial stages or as it evolves into a fully operational single family office. It is essential that the core theme of "family first" remains at the forefront, which is why the themes for the summit have been meticulously designed to reflect this principle, with a particular focus on the impact of women within this framework.

## Themes

<b>Day One (half-day)</b>	Setting the Stage
<b>Day Two</b>	The Feminine Touch in Families and Family Enterprises
<b>Day Three</b>	The Female-Led Family Office

## Who should attend?

- **Family Office Executives:** Professionals who manage the wealth and operations of single- or multi-family offices.
- **Ultra-High-Net-Worth Individuals (UHNWIs):** Those seeking insights into wealth management, generational wealth transfer, and investment opportunities.
- **Wealth Managers and Advisors:** Professionals seeking to network and stay informed about trends in wealth management.
- **Investors:** Individuals interested in exploring co-investment opportunities and understanding the impact of technology and sustainability in wealth management

# Day One

## Setting the Stage

12:00 – 12:30	Arrival and Registration
12:30 – 13:30	Networking and Snacks
13:30 – 13:40	Welcome
13:40 – 13:50	Setting the Stage for Innovation and Disruption: Female-Fit Family Offices
13:50 – 14:30	First Round of the Open Stage Discussion
14:30 – 15:00	Tea Break
15:00 – 15:40	Second Round of the Open Stage Discussion
15:40 – 16:00	Key-takeaways and Feedback from the Open Stage Discussion
16:00 – 16:40	Keynote Address by Red Diamond Sponsor
16:40 – 17:00	Wine as an Investment: A Feminine Touch
17:00 – 18:30	Cocktail Event



# Day Two

## The Feminine Touch in Families and Family Enterprises

08:00 - 08:30	Arrival and Snacks
08:30 - 08:40	Introduction - Moderated by Linda Sacks
08:40 - 09:10	Positive Versus Negative Disruption of the Status Quo in Families, Family Enterprises, and Family Offices
09:10 - 09:40	Family Enterprises as a Catalyst for Family Offices, Trends and Challenges
09:40 - 10:00	Embedded Family Offices and the Role Each Family Member Plays (Panel discussion and case study)
10:00 - 10:20	Tea Break
10:20 - 10:50	The Role of the CIO in an Embedded Family Office Structure // Adri Muller and Kate Rees
10:50 - 11:20	The First Disruptor
11:20 - 11:40	The Second Disruption – Working Towards the Switch
11:40 - 12:00	Innovative Ways to Work Between the First Disruptor and a Single Family Office Switch
12:00 - 12:30	The Business Owner, Versus the Business Builder: the girl child to the woman who leads: transitions and empowerment
12:30 - 13:30	Networking Lunch

# Day Two

## The Feminine Touch in Families and Family Enterprises

13:30 - 14:00	Liquidity Events versus Liquidity, the Impact on Family Engagements and Investment Trends
14:00 - 14:20	Sudden Transitions and Their Effects on Women within Business-Led Families
14:20 - 14:40	Who is in the Reporting or Firing Line, and How do we Report and Communicate? Trends, changes, and preferences.
14:40 - 15:00	Tea Break
15:00 - 15:20	Cross-Border: What Comes First, the Family Office or Enterprise Expansion? Taxes, structuring, investing, and planning
15:20 - 16:10	Preliminary steps for protecting the pre-stage single family office through innovative business practices and maintaining a strong business profile, whilst preparing the next generation.
16:10 - 16:20	Maintaining family harmony through proactive governance structures while expanding the family office's value proposition
16:20 - 16:30	The Switch – Women's Representation on Board Level in Dubai and Mauritius.
16:30 - 17:00	Event Close
18:30 - 20:00	VIP Fireside Chat (Single Family Offices)



# Day Three

## The Female-Led Family Office

08:30 - 09:00	Arrival and Snacks
09:00 - 09:10	Introduction - Moderated by Kate Rees
09:10 - 09:20	Is Education the Key to Creating Impact and Sustainability? Design for Impact, Linda Sacks
09:20 - 09:30	The Family Office Intern - The Family Office Influencer: Lucia De Klein
09:30 - 10:00	Family offices are increasingly hiring top talent from investment banks, hedge funds, and private equity firms to enhance their expertise and pursue complex investment strategies. How should we prepare our daughters, and should they first join another corporation?
10:00 - 10:20	Tea Break
10:20 - 10:50	Investment Disruptors or Traditional Views: Impact on Family Offices, when Transitioning. There is a noticeable shift in investment strategies, with an increasing emphasis on alternative investments, including private equity, venture capital, and real estate. This is happening alongside traditional assets, such as stocks and bonds. As a result, family offices are adapting their approach to include a more diversified investment portfolio; however, will we see new trends emerge with a change in leadership?
10:50 - 11:10	Impact Investing by Women: Many family offices are focusing on investments that align with social and environmental goals, such as renewable energy, education, and microfinance. How will this change, or will it remain the same?
11:10 - 11:30	Capital Allocations, Lending, and Investing Trends under New Leadership, Co-investments, and more
11:30 - 12:00	Digital Assets - Are Women Investing in Crypto?

# Day Three

## The Female-Led Family Office

12:00 - 13:00	Networking Lunch
13:00 - 13:30	Optimizing the Family Office Structure for Change
13:30 - 14:00	A Global Look at Family Offices, and Family Stories
14:00 - 14:30	Deals and More Deals, Reporting and Securing What Matters Most
14:30 - 15:00	Jurisdiction-specific Discussion and Comparison
15:00 - 15:20	Tea Break
15:20 - 15:30	Prize Giveaways
15:30 - 15:40	Luxury Trends for Lifestyle or Investment?
15:40 - 16:00	Family offices and Philanthropy: setting the stage for expansion and self-actualization by realizing and fulfilling one's full potential while striving for personal growth and meaning in life
16:00 - 16:20	Global Family Offices and Access to Networks
16:20 - 16:30	Closure: Diamonds and Dust

*\*Programme subject to change*