

The Henley Family Office Program is a unique online program geared toward professionals in the Private Banking and Wealth Management space. The focus is on practical knowledge from set up to management.

ABOUT THE PROGRAM

- Taught by leading industry practitioners
- Unprecedented networking opportunities with mentors and other leading professionals in the industry
- The Certificate of Completion in Family Office Management - a professional award from Henley Business School Executive Education upon successful completion

PROGRAM DELIVERY

- Flexible approach: self-paced online study plus elective webinar-style speaker sessions
- Industry events held online and in person in major financial centres to expand your professional network in the Family Office industry

FORMAT OF THE PROGRAM

- 12 online core curriculum lectures by industry professionals which can be watched in your own time and at your own pace
- Online knowledge checks to test understanding
- Free membership of the IPI Career Network for one year
- Regular elective webinar-style speaker sessions (recorded for later access if required)

The emphasis is on learning from experienced professionals and networking with members of the family office industry.

WHO WILL BENEFIT FROM THE PROGRAM?

- **Service Providers** e.g. Private Bankers, Accounting and IT professionals, Lawyers, Trust Administrators
- **Family Office Professionals** seeking to enhance their knowledge
- **Individuals** looking to start a Family Office
- **Career Movers** including those interested in moving to Private Banking roles

HENLEY BUSINESS SCHOOL

- Henley is the UK's oldest business school
- Ranked in the Financial Times as one of the global top 20 schools for Executive Education
- Among an elite group of business schools to be triple-accredited by AACSB, AMBA & EQUIS

INDUSTRY PARTNERS & SPONSORS



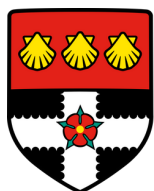
INSTRUCTORS

The **Henley Family Office Program** is delivered by professionals with many years of experience in the Wealth Management space.

1 - Overview of the Family Office & Foundations of a Successful FO 2 - Succession & Estate Planning 3 - Tax Considerations 4 - Structuring & Set-up	Lachlan Campbell - Mad Success Ltd Walid Chiniara - Advisor to Business Families Sophie Carr - Withers / Carolyn Butler - International Fiduciaries Nigel Hobler & Matthew Sung - KPMG / Craig Kemsley - Calibrate Partners Jeremy Arnold - Withers
5 - Governance 6 - Portfolio Management 7 - Ops, Tech & Administration 8 - The Private Bank Relationship	Julian Lim - Alpha Calibration Tariq Dennison - GFM Asset Management / James Quinn - Q9 Capital / Shinya Deguchi - Star Magnolia Capital Vanessa Gibson - Illio / Matthew Sung - KPMG / Lucia Perchaud - Apex Kenneth Ho - Carret Private Capital
9 - Non-Financial Services 10 - HR Management 11 - Philanthropy 12 - Risk Planning & Crisis Management	Lucia Perchaud - Apex / James Haithwaite - IQ-EQ / Alex Dean - IQ-EQ / Tiffany Liu - Star Magnolia Capital Paul Westall & Tayyab Mohammad - Agreus Group Jennifer Emms - Maurice Turnor Gardner LLP Arabella Murphy - Propitious / Ann Cooley - Pacific Hawk

CREDENTIAL

Certificate of
Completion from
Henley Business
School



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Standard Individual
Fees:
US\$3,000

*Sales tax
may
apply

**ADMISSION
FEES**

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www.ipi-edu.com

The Henley Family Office Program is produced globally by Inflection Point Intelligence.
The Certificate of Completion is awarded by Henley Business School, University of Reading, UK