



SWFI FORT
FAMILY OFFICE ROUND TABLE

THE CONVERGENCE OF CAPITAL

ABU DHABI | SHARJAH | DUBAI
UNITED ARAB EMIRATES

21-22-23
JANUARY
2025



HOSTED BY



"An excellent opportunity to engage with asset owners and investment decisionmakers"

Lord Johnson, UK Minister for Investment



“A great opportunity for large investors to find ways to join forces”

Mohammad bin Abdulaziz Alajlan
Deputy Chairman, Ajlan & Bros Holding



“An excellent opportunity to engage with asset owners and investment decisionmakers”

Lord Johnson,
UK Minister for Investment



“The networking opportunity along with the discussion sessions provided a platform for in-depth exploration, understanding, and exchange of ideas.”

H.E. Dr. Nayef Falah Al-Hajraf
Secretary General of The Gulf Cooperation Council (2020-2023)



“The quality of the event, panel sessions and speeches made it a truly leading global forum to discuss key issues with a wide range of large asset owners.”

Ruston Smith
Chairman,
Tesco Pension Fund



“Reaffirms our collective commitment as custodians of global prosperity”

Matthew Hurn OBE
Chief Financial Officer,
Disruptive Investments, Mubadala



“A well-coordinated and insightful conference”

Omar Al Mulla
Chief Executive, Osool Investments,
Sharjah Asset Management Holding

THE WORLD'S LEADING
FAMILY OFFICE
ROUND TABLE



SWFI FORT

PRESENTED BY



OUR MISSION: RELATIONSHIP CAPITAL

We help you build your most valuable asset by creating tangible opportunities to network, influence and navigate investment environments.

HOW WE DO THIS:

PEOPLE, PLACE, PLATFORM, PURPOSE

We unite decision-makers from across our global network to create carefully curated environments designed to foster relationships that create lasting value and engender change.

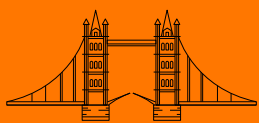


THE CONVERGENCE OF CAPITAL

In an increasingly interconnected world, the role of family offices has evolved beyond wealth preservation to become powerful drivers of global economic and social change. At the heart of this evolution lies the theme of "The Convergence of Capital," which signifies a pivotal moment in the world of wealth management. This theme underscores the unification of family offices from across the globe, embarking on a transformative journey that seeks not only to protect and grow wealth but also to shape the future of global prosperity.

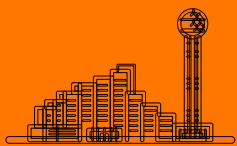
"GLOBAL WEALTH IN ACTION",

the theme of the 2023 Global Wealth Conference in London, ignited the call for proactive participation, urging us to harness our collective wealth as a force for global betterment.



"PRESERVING LEGACY AND PROMOTING PROSPERITY",

the theme of the 2023 FORT North America in Dallas, delved into the profound role family offices play in nurturing and safeguarding wealth across generations while advancing societal well-being.



"ABUNDANCE FOR THE FUTURE",

the theme of the 2024 FORT in Dubai, United Arab Emirates, now takes center stage. This theme is a testament to the resolve and vision of families and their offices in driving positive change, not only for the world's economies but for the planet and humanity itself.



SUSTAINABILITY, ALLOCATION, AND INNOVATION

the theme of GWC 2024 integrated ESG principles, strategic allocation, and innovative strategies in wealth management for lasting impact and growth. SAI drove positive impact, fostered responsible stewardship of wealth, and propelled the financial industry toward a more sustainable and innovative future.



The Convergence of Capital represents a gathering of diverse minds, resources, and visions, all united by a shared commitment to creating a better future. This journey is about more than financial success; it's about leveraging collective capital to foster innovation, drive sustainable growth, and ensure a lasting impact on the world's economies and societies. As family offices and global leaders come together under this theme, they symbolize a new era of collaboration, where wealth is not merely accumulated but actively used as a tool for positive global transformation.

This convergence is a testament to the vision and resolve of the families behind the family offices, who recognize that their influence extends far beyond financial markets. They understand that the true value of wealth lies in its potential to create meaningful change, and they are committed to using their resources to address some of the most pressing challenges of our time. Whether it's investing in sustainable technologies, supporting social enterprises, or contributing to global philanthropic efforts, these family offices are leading the way in redefining what it means to be stewards of wealth.

At the core of The Convergence of Capital is the idea that wealth, when combined with vision and purpose, can be a powerful force for good. It's about channeling global capital into initiatives that promote long-term sustainability, inclusivity, and prosperity. This theme invites family offices to engage in bold, innovative strategies that not only enhance financial returns but also contribute to the well-being of the planet and its people. By aligning their investment strategies with their values, these families are helping to create a future where wealth serves as a catalyst for widespread positive change.

In this spirit of collaboration and innovation, The Convergence of Capital will serve as a platform for family offices and global leaders to exchange ideas, forge partnerships, and drive initiatives that have the power to transform industries, communities, and nations. By coming together, they are not just safeguarding their legacies; they are creating a future where wealth is a tool for building a better world for generations to come.

JOIN US AS WE EMBRACE THIS VISION, WHERE THE CONVERGENCE OF CAPITAL SPARKS A NEW ERA OF GLOBAL PROSPERITY AND IMPACT.

AN INVITE-ONLY EVENT

3 DAY POWER
PACKED EVENT

1 COMMON
THEME

550 SELECTIVE INVITED
GUESTS

4 ILLUMINATING PANEL
DISCUSSIONS

3 KEYNOTE
SPEECHES

6 PIONEERING START-UP PITCHES,
SHOWCASING THE LATEST IN
INNOVATION

6 NETWORKING
SESSIONS

5 GOOD FELLOWS
AWARD RECOGNITIONS

2 TRILLION USD
AUM HALL

1 MAJLIS
GATHERING



WHO WILL BE ATTENDING?

KEY DECISION MAKERS FROM

FAMILY OFFICES FROM MULTIPLE COUNTRIES, PARTICULARLY FROM MENA NATIONS,
ROYAL FAMILIES
GLOBAL SOVEREIGN WEALTH FUNDS
SOVEREIGN DEVELOPMENT FUNDS
PUBLIC FUNDS
PENSION FUNDS
ENDOWMENTS
SUCCESSFUL ENTREPRENEURS
LARGE FINANCIAL INSTITUTIONS
FEDERAL BANKS
POLICY MAKERS
PUBLIC INFLUENCERS
HEDGE FUNDS
REAL-ESTATE FUNDS
LARGE ALLOCATORS
ASSET MANAGERS
MEDIA & PUBLICATIONS
ACADEMIC INSTITUTIONS
REGULATORS
PROMINENT CEOS
FORTUNE 500 COMPANIES
WEALTH ADVISERS AND
MORE.

**HOST CITIES FOR
SWFI FORT DUBAI 2025**



Scan QR code to know more
about the venue

BESPOKE FORMAT

MAXIMIZES INVESTMENT INTERACTIONS

SWFI events offer a blend of heavy-hitting panel discussions and plenary sessions with regular networking opportunities and social interactions to maximize time spent exchanging views and sharing best practices while creating new linkages and deepening existing relationships.

JOIN US FOR THE EVENT WHERE EVERY MOMENT IS AN OPPORTUNITY TO CONNECT AND EVERY SESSION PROMISES A WEALTH OF INSIGHTS.



These are the actual event photographs from SWFI FORT Middle East 2024 hosted in Dubai at the Museum of The Future. For more information, visit fort.global.

PROGRAM AGENDA

DAY ONE:
JANUARY 21ST | ABU DHABI

DAY TWO:
JANUARY 22ND | SHARJAH

DAY THREE:
JANUARY 23RD | DUBAI



PROGRAM AGENDA

DAY ONE: ABU DHABI, 21 JANUARY 2025

THE CONVERGENCE OF CAPITAL: SOVEREIGN FUNDS AND FAMILY OFFICES UNITE

The SWFI ethos of 'People, Place, Platform, Purpose' resonates deeply with the values upheld in a traditional Majlis - a safe space where participants gather to openly engage in a dialogue, forge relationships and exchange experiences. Together, they embody a commitment to navigating common challenges and preserving wealth for future generations while fostering a strong sense of community and shared purpose.

This special session addresses one of the most pressing issues of the day - the impact of multiple crises on decision-making. It draws together asset owners of different types with academics and industry experts to better understand these issues and share strategies for mitigating risk and better understanding emerging opportunities.

1630 – 1730 Registration and Refreshments

1800 – 1810 Welcome Remarks

1810 – 1830 Opening Address

1830 – 1930 Majlis

GLOBAL MACRO: THE IMPACT OF GEOPOLITICS AND ECONOMIC HEADWINDS

In recent years, family offices have faced an increase in interrelated challenges such as economic instability, trade disputes, geopolitical conflicts, social unrest, climate change, and health crises. Yet their independent structure and long-term investment approach affords them greater flexibility than traditional institutional investors. They can act quickly and plan for the long term, even in times of uncertainty and challenges. A focus on strategic diversification, risk management, and collaboration with international partners allows them to mitigate risks and capitalize on emerging opportunities. This panel explores how different types of asset owners approach these issues, and to what extent strategies adopted in one jurisdiction or among one type of investor can apply to another.

- **Global Economic Trends:** Family businesses can be deeply affected by global economic trends and geopolitical shifts. Close monitoring of these events is crucial for informed decision-making.
- **Liquidity and Financial Management:** Balancing long-term investments with short-term obligations is challenging, requiring prudent financial strategies to maintain liquidity and stability.
- **Risk Management:** Effectively managing investment risks, cybersecurity threats, and other operational risks is a continuous challenge, especially with diverse portfolios.
- **Strategic Alliances:** Forming partnerships with global investors and other experts enhances resilience against geopolitical and macroeconomic disruptions, enabling collaborative solutions to complex challenges.

1930 – 2130 Dinner discussion

Guests move to adjacent room to be seated for dinner

PROGRAM AGENDA

DAY TWO: SHARJAH, 22 JANUARY 2025

THE CONVERGENCE OF CHARITY: PHILANTHROPY, EDUCATION AND SOCIAL INVESTMENT

1630 – 1700 Registration and Refreshments

1700 – 1710 Welcome Remarks

1710 – 1720 Opening Address

1720 – 1830 Moderated Roundtable Discussion

UNITED ARAB EMPATHY: ALIGNING FAMILY VALUES WITH SUSTAINABLE PHILANTHROPY

In the Middle East, philanthropy and family-run charitable foundations are increasingly aligning family values with social influence to drive sustainable futures. As the cultural capital of the UAE, Sharjah's emphasis on education, traditional values and a deep commitment to humanitarian efforts and social welfare make it a natural home for many of these entities.

These foundations are pioneering in sustainable investment products, particularly in education, healthcare, and biotech, blending traditional values with modern impact investing. They actively contribute to global challenges, shaping long-term visions for societal improvement. The trend shows a strong focus on education and healthcare as key areas, reflecting the region's commitment to fostering innovation and resilience.

Through these initiatives, Sharjah's family-run organizations are establishing themselves as leaders in sustainable philanthropy. This roundtable session looks at emerging trends and best practices, from Sharjah to the wider GCC region – and further.

- **International Philanthropy:** Many family offices are engaging in cross-border initiatives with an impact to address global challenges such as poverty, education, and climate change.
- **Second generation philanthropy:** Strategic philanthropic models like impact investing, micro lending, and donor-advised funds often support the economic inclusion of women.
- **Education:** Technology-driven segments such as online learning platforms have been growing, with a strong demand for quality education driving investments across the region.
- **Healthcare and Biotechnology:** Investments in healthcare and biotechnology have been on the rise, driven by aging populations and advancements in technology.

PROGRAM AGENDA

DAY TWO: SHARJAH, 22 JANUARY 2025

INAUGURAL CHARITY DINNER IN THE MIDDLE EAST

Held in collaboration with a distinguished charitable foundation and the Sovereign Wealth Fund Institute, the inaugural Middle East Charity Dinner will be held on January 22 in the Emirate of Sharjah. This event will unite like-minded individuals to raise funds for the foundation. Guests who would like to make a charitable gift to the foundation are warmly invited to an unforgettable evening of discussion and networking, serving as a catalyst for meaningful, long-term change both in the region and further afield.

1830 – 1930 Registration and Networking Reception

1930 – 1940 Welcome Remarks

2000 – 2010 Address from Charitable Foundation

2040 – 2110 GOOD Fellows Award Felicitations and GOOD Talk

2125 – 2130 Vote of Thanks to Close

PROGRAM AGENDA

DAY THREE: DUBAI, 23 JANUARY 2025

THE CONVERGENCE OF CULTURES: DUBAI AS A GLOBAL FAMILY OFFICE HUB

0830 – 0930 Registration and Networking

Morning Session One

0930– 0940 Welcome, Housekeeping and Setting the Tone for Day Three

0940– 1000 Opening Remarks

1000 – 1050 Panel Discussion One

THE INTERNATIONALISATION OF DUBAI'S FAMILY OFFICE ECOSYSTEM

Dubai is rapidly becoming a global hub for family offices by offering a favorable regulatory environment, tax benefits, and advanced infrastructure. The Dubai International Financial Centre (DIFC) provides a flexible legal framework, while the city's tax-free status and deepening financial services attract international wealth management. Dubai's high standard of living, safety, and strategic location appeal to family offices from the UK, Switzerland, India, Russia, and GCC countries. The city's growing status as a global financial hub and its networking opportunities make it a preferred destination for wealth management entities from Europe, Asia, and the Middle East. This panel explores the international opportunities this ecosystem offers family offices to diversify investments, share expertise, and enhance opportunities. Here are four key ways they do so:

- **Co-Investments:**
Family offices pool resources for large-scale investments, accessing deals too big for one entity and diversifying portfolios.
- **Cross-Border Investments:**
Investing in international real estate and venture capital, family offices diversify geographically to mitigate risk and tap into emerging markets.
- **Strategic Partnerships**
Family offices collaborate with peers and sovereign wealth funds, leveraging combined expertise and capital for mutual benefit in global ventures.
- **Regulatory Compliance:**
Family businesses in the Middle East face challenges in navigating stringent, rapidly changing regulations, including tax laws, employment rules, and trade policies.

1050 – 1110 GOOD Fellows Award Felicitations and GOOD Talk

1110 – 1140 Networking Break

PROGRAM AGENDA

DAY THREE: DUBAI, 23 JANUARY 2025

THE CONVERGENCE OF CULTURES: DUBAI AS A GLOBAL FAMILY OFFICE HUB

Morning Session Two

1140 – 1200 Opening Remarks

1200 – 1250 Panel Discussion Two

GROWING PAINS: GOVERNANCE, SUCCESSION PLANNING AND NEXT GEN ENGAGEMENT

As the number of family offices globally continues to grow, operating models must evolve to accommodate new challenges. This session explores the critical role of family governance and outlines operational priorities to ensure the longevity and prosperity of family-owned businesses, with a particular focus on investment decision-making and diversification. Key topics include the establishment of family protocols, succession planning, and the active involvement of the next generation in governance and investment choices. Experts discuss how structured governance aids in resolving conflicts, supporting smooth generational transitions, and making informed investment decisions that align with family values and long-term goals. The discussion will explore the unique challenges faced by Gulf family businesses and to what extent structures adopted by overseas family offices suit the region's family business dynamic.

- **Governance Challenges:** Balancing family interests with professional management is crucial but often met with resistance, complicating efforts to formalize roles and responsibilities.
- **Succession Planning:** Ensuring smooth leadership transitions in family businesses is complex, as inadequate planning can lead to internal conflicts and affect stability.
- **Next Generation Engagement:** Family offices focus on educating younger members in wealth management, preparing them for future responsibilities and understanding global markets.
- **Talent Acquisition and Retention:** Attracting and retaining top talent with specialized expertise in wealth management and operations remains a challenge for many family offices.

1250 – 1310 GOOD Fellows Award Felicitations and GOOD Talk

1310 – 1430 Networking Lunch

PROGRAM AGENDA

DAY THREE: DUBAI, 23 JANUARY 2025

THE CONVERGENCE OF CULTURES: DUBAI AS A GLOBAL FAMILY OFFICE HUB

Afternoon Session One

1430 – 1440 Opening Remarks

1440 – 1530 Panel Discussion Three

CO-INVESTMENT LANDSCAPE: SOVEREIGN FUNDS, FAMILY OFFICES AND STRATEGIC PARTNERSHIPS

This panel discussion examines the rising trend of co-investment between family offices and sovereign wealth funds, with a special focus on the Middle East region. As family office investment practices become more sophisticated, investment partnerships with SWFs have become an effective and often cost-efficient strategy, offering significant benefits. These include resource pooling, risk diversification, and access to unique investment opportunities. By combining their expertise in industry, regional markets, and other niche areas, both parties can achieve enhanced returns. This session explores how these collaborations are reshaping the investment landscape, the advantages they provide, and the future potential for such partnerships. With a sustained emphasis on portfolio diversification, asset classes covered in this session include:

- **Private Equity and Venture Capital:** Popular for high returns, despite higher risks. Increased focus on tech, healthcare, and renewable energy sectors.
- **Alternatives to Fixed Income:** Explore heightened interest in direct lending and structured credit for higher returns amid low-interest rate environments.
- **Real Estate:** Renewed interest in data centers, logistics, multi-family housing, and REITs offering stable returns in evolving markets.
- **Infrastructure and Renewable Energy:** Favored for stable, long-term returns, inflation protection, and alignment with global sustainability and decarbonization goals.

1530 – 1550 GOOD Fellows Award Felicitations and GOOD Talk

1550 – 1620 Networking Break

PROGRAM AGENDA

DAY THREE: DUBAI, 23 JANUARY 2025

THE CONVERGENCE OF CULTURES: DUBAI AS A GLOBAL FAMILY OFFICE HUB

Afternoon Session Two

1620 – 1630 Opening Remarks

1630 – 1720 Panel Discussion Four

FAMILY OFFICE 2030: TECHNOLOGY, DIGITAL TRANSFORMATION AND NEW ASSET CLASSES

Family offices, influenced in part by the next generations, are increasingly adopting new technologies to boost efficiency, investment analysis, and data security. They are leveraging advanced tools for portfolio management and risk assessment, guiding informed decisions in rapidly evolving markets. This session outlines a roadmap for adapting to emerging technologies and explores new and emerging high-yield asset classes like AI, fintech, e-commerce - and digital assets, despite their volatility. Additionally, private debt has become a key alternative investment offering attractive yields, while luxury goods, including art and high-end collectibles, continue to gain popularity among Middle Eastern investors seeking diversification and wealth preservation.

- **Technology and Innovation:** Investment in AI, fintech, and e-commerce is booming as digital transformation accelerates, driving interest in tech startups and established companies.
- **Private Debt:** Exploring the evolution of private debt as a critical alternative investment, offering attractive yields amid low interest rates and volatile markets.
- **Cryptocurrencies and Digital Assets:** Digital assets offer potential high returns, despite volatility and regulatory uncertainties, all of which require careful consideration.
- **Lifestyle and Luxury Goods:** Investments into cars, art, watches and jewelry and high-end real estate can offer attractive returns over the medium term, despite fluctuations.

1720 – 1740 GOOD Fellows Award Felicitation and GOOD Talk

1740 – 1745 Closing Remarks and Announcements for Day Three

SWFI FORT Global event is brought to you by the Sovereign Wealth Fund Institute (SWFI).

The event is hosted by the same prominent team that led SWFI FORT Middle East at the futuristic Museum of The Future in February 2024.



SWFI: MOBILIZING INSTITUTIONAL AND PRIVATE CAPITAL SINCE 2008

SWFI stands at the vanguard of global finance, serving as the nexus between sovereign wealth funds, pensions, endowments, superannuation funds, and family offices. With its wide-reaching influence, SWFI orchestrates a symphony of ideas, innovation, and investment, driving the agenda for sustainable and inclusive global wealth.

Our community, comprising over 70,000 professionals and representing more than 1,200 public institutional investors from over 60 countries, is a testament to our expansive reach and our pivotal role in shaping global financial trajectories. This network, underpinned by a shared commitment to financial prosperity, enables a rich exchange of ideas and innovation, driving sustainable and inclusive global wealth.

SWFI PAST EVENTS IN SYNOPSIS

80+
Private Global Events

60+
cities

1,000+
Institution Participation

500+
family offices

12,000+
Delegates

20+
Countries

600+
Prominent Speakers

300+
Networking Dinners

750+
Topics Discussed

300+
Endowments

50+
Regulatory
Organizations

70+
Sovereign Wealth
Funds

AND MORE

GOOD FELLOWS AWARDS

Initiated by SWFI, the Global Order Of Outstanding Disruptors (GOOD) Fellows is a non-profit endeavor and a tribute to the 'Modern Greats of Wealth', the audacious and visionary individuals who, through innovation, integrity, and commitment, are redefining the narrative of wealth.

An integral part of the felicitation is the GOOD Talk. This is a 15-minute interactive dialog between each award recipient and the SWFI Chairman, Lakshmi Narayanan. Here the recipients share their vision and experiences, offering insights into their journey and the motivations behind their impactful work. The idea is to not only celebrate their achievements but also serve to inspire the audience, reinforcing the importance of using wealth and influence for the greater good.



These are the actual event photographs from the GOOD Fellows Awards Ceremony hosted at SWFI FORT Middle East 2024 hosted in Dubai at the Museum of The Future. For more information, visit [fort.global](https://www.fort.global).

HIGH IMPACT GATHERINGS IN 2024

GLOBAL WEALTH CONFERENCE | LONDON MAY 2024



These are the actual event photographs from GWC 2024 hosted in London at the iconic Parliament of UK and Guildhall, Great Hall. For more information, visit [gwc.events](https://www.gwc.events).

SWFI FORT MIDDLE EAST | DUBAI FEBRUARY 2024



These are the actual event photographs from SWFI FORT Middle East 2024 hosted in Dubai at Museum of The Future. For more information, visit [fort.global](https://www.fort.global).

GLOBAL WEALTH CONFERENCE | LONDON MAY-JUNE 2023



These are the actual event photographs from GWC 2023 hosted in London at the iconic Parliament of UK and Guildhall, Great Hall. For more information, visit [gwc.events](https://www.gwc.events).

SWFI FORT NORTH AMERICA | DALLAS OCTOBER 2023




These are the actual event photographs from SWFI FORT North America 2023 hosted in Dallas at The Star. For more information, visit [fort.global](https://www.fort.global).


SWFI EVENTS

GLOBAL EVENTS CALENDAR

2025 PROGRAMME



SWFI FORT MIDDLE EAST
JANUARY 21-23, 2025
ABU DHABI | SHARJAH | DUBAI
UNITED ARAB EMIRATES



SWFI FORT NORTH AMERICA
MARCH 2025
DALLAS, TX
USA



GLOBAL WEALTH CONFERENCE
JUNE 3, 4, & 5, 2025
LONDON
UK

*Note: The dates and the location are subject to change. See www.fort.global for up to date information.

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SWFI FORT
FAMILY OFFICE ROUND TABLE



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