Henley Family Office Program

Henley Business School, University of Reading

Inflection Point Intelligence — Practical Financial Education

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 Henley Certificate in Family Office Management 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

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PROPITIOUS

MTG

CURRICULUM & FACULTY

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 & Managing Family Wealth 2 - Succession/Transition Planning 3 - Tax Considerations 4 - Structuring & Set-up	Lachlan Campbell - Mad Success Walid Chiniara - Family Advisor (Deloitte) Sophie Carr - Withers / Carolyn Butler - International Fiduciaries Darren Bowdern & Matthew Sung - KPMG 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 Vanessa Gibson - Illio Kenneth Ho - Carret Private Capital
9 - Non-Financial Services 10 - HR Management 11 - Philanthropy 12 - Risk Management	Tiffany Liu - Star Magnolia Capital / Paul Westall & Tayyab Mohammad - Agreus Group Jennifer Chambers & Jennifer Emms - Maurice Turnor Gardner LLP Arabella Murphy - Propitious / Ann Cooley - Pacific Hawk

ADMISSION FEE

US$3,000 for the Henley Certificate in Family Office Management upon completion.

** Sales tax may apply

CONTACT US

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Register now for added benefits:

All program participants will receive free access for 3 months to HFM Global media, the number one source of industry news and views.