



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

Day One (half-day)	Setting the Stage
Day Two	The Feminine Touch in Families and Family Enterprises
Day Three	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 // Anne Klein on behalf of LuciaDeKlein
13:40 – 13:50	Setting the Stage for Innovation and Disruption: Female-Fit Family Offices // Adv Saninke Du Rand
13:50 – 14:30	First Round of the Open Stage Discussion // Lerato Lebitsa (host)
14:30 – 15:00	Tea Break
15:00 – 15:40	Second Round of the Open Stage Discussion // Jamille Jinnah
15:40 – 16:00	Key-takeaways and Feedback from the Open Stage Discussion // Adv Saninke Du Rand
16:00 – 16:40	Keynote Address by Diamond Sponsor // First keynote: Stefan Le Roux. Second keynote: Mathys Briers-Louw, then handing over to Johan Malan
16:40 – 17:00	Wine as an Investment: A Feminine Touch // Johan Malan
17:00 – 18:30	Cocktail Event // Sponsored by SL Law

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 supported by supported by Alan Barr
08:40 – 09:10	Positive Versus Negative Disruption of the Status Quo in Families, Family Enterprises, and Family Offices // Hosted by Creagh Sudding with Anthea Stephens
09:10 – 09:40	Family Enterprises as a Catalyst for Family Offices, Trends and Challenges // Panel discussion with Anne Klein, Stefan Le Roux
09:40 – 10:00	Embedded Family Offices and the Role Each Family Member Plays (Panel discussion and case study) // Ilzemarie Knoetze, Kate Rees and Adri Muller
10:00 – 10:20	Tea Break
10:20 – 10:50	The Role of the CIO in an Embedded Family Office Structure // Adri Muller
10:50 – 11:20	The First Disruptor // Alan Barr
11:20 – 11:40	The Second Disruption – Working Towards the Switch // Elsa van der Westhuizen
11:40 – 12:00	Innovative Ways to Work Between the First Disruptor and a Single Family Office Switch // Mbonisi Ndlovu (host), Alan Barr, Elsa van der Westhuizen and Luciano Zaina
12:00 – 12:30	The Business Owner, Versus the Business Builder: the girl child to the woman who leads: transitions and empowerment // Jamille Jinnah, in conversation with Lerato Lebitsa
12:30 – 13:30	Networking Lunch // Sponsored by Zaina

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 // Luciano Zaina
14:00 - 14:20	Sudden Transitions and Their Effects on Women within Business-Led Families // Jamille Jinnah with Adri Muller and Luciano Zaina
14:20 - 14:40	Who is in the Reporting or Firing Line, and How do we Report and Communicate? Trends, changes, and preferences // Shaun Slabber Sponsored by Garde Capital
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 // Arun Kutowaroo
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 // Brian DeLucia
16:10 - 16:20	Maintaining family harmony through proactive governance structures while expanding the family office's value proposition // Anne Klein
16:20 - 16:30	The Switch – Women's Representation on Board Level in Dubai and Mauritius // Arun Kutowaroo
16:30 - 17:00	2nd Day Event Close
18:30 - 20:00	VIP Fireside Chat (Single Family Offices) – Closed event

Day Three

The Female-Led Family Office

08:30 – 09:00	Arrival and Snacks
09:00 – 09:10	Introduction – Moderated by Kate Rees supported by Creagh Sudding
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 Sponsored by Financial Services Authority Seychelles
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? // Ziphozihle Ntlanganiso
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? // Led by Alan Barr, in discussion with Kate Rees, Gqibelo Dandala, and Lerato Lebitsa
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? // Adv Saninke du Rand in conversation with Gqibelo Dandala
11:10 – 11:30	Capital Allocations, Lending, and Investing Trends under New Leadership, Co-investments, and more // Stefan le Roux in conversation with Luciano Zaina
11:30 – 12:00	Digital Assets – Are Women Investing in Crypto? // Mbonisi Ndlovu

Day Three

The Female-Led Family Office

12:00 – 13:00	Networking Lunch Sponsored by Fragomen
13:00 – 13:30	Optimizing the Family Office Structure for Change // Kate Rees and Anne Klein
13:30 – 14:00	A Global Look at Family Offices, and Family Stories // Anthea Stephens
14:00 – 14:30	Deals and More Deals, Reporting and Securing What Matters Most // Jamille Jinnah in conversation with Luciano Zaina
14:30 – 15:00	Jurisdiction-specific Discussion and Comparison // Arun Kutowaroo
15:00 – 15:20	Tea Break
15:20 – 15:30	Prize Giveaways // Anne Klein *A designer outfit valued at R10,000.00 *Book prizes
15:30 – 15:40	Luxury Trends for Lifestyle or Investment? // All
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 // Gqibelo Dandala and Aneria Bouwer
16:00 – 16:20	Global Family Offices and Access to Networks // Damien Steyn
16:20 – 16:30	Closure: Diamonds and Dust Sponsored by Vecosa

Meet the speakers



**Brian
DeLucia**

Managing Partner
Arrivato LLC
brian.delucia@arrivatollc.com



**Mathys
Briers-Louw**

Attorney
SL Law
mathys@sllaw.co.za



**Lerato
Lebitsa**

Business Development Manager
Capital International
L.lebitsa@capital-sa.com



**Stefan
le Roux**

Attorney
SL Law
stefan@stefanleroux.co.za



**Anthea
Stephens**

Director
Anthea Stephens Private Client Attorney
anthea@antheastephens.co.za



**Luciano
Zaina**

Founder
Zaina Wealth Management
luciano@zainainvest.com



**Johan
Malan**

Head of Bordeaux, Investments and Brokerage
Wine Cellar
johan@winecellar.co.za



**Elsa
van der
Westhuisen**

Director
Vecosa Fiduciary
elsa@vecosa.co.za



**Saninke
du Rand**

Advocate
Consultant
adv.sdr@outlook.com



**Creagh
Sudding**

Associate Director
KPMG
Creagh.Sudding@kpmg.co.za



**Ziphozihle
Ntlanganiso**

Assistant Manager
Fragomen
Ziphozihle.Ntlanganiso@fragomen.com



**Alan
Barr**

Head of Private Enterprise
KPMG
alan.barr@kpmg.co.za

Meet the speakers



**Arun
Kutowaroo**

Barrister at Law
KL Chambers
arunkutowaroo@hotmail.com



**Damien
Steyn**

Business Development Manager
OMC Group
dsteyn@omcgroup.com



**Anne
Klein**

Director
LuciaDeKlein
anne@luciadk.com



**Gqibelo
Dandala**

Executive Director
One To One Africa
gqibelo@onetoonechildrensfund.org



**Kate
Rees**

Independent Consultant
LuciaDeKlein
kate@luciadk.com



**Jamille
Jinnah**

Independent Consultant
LuciaDeKlein
jamille@luciadk.com



**Adri
Muller**

Founder
Out the Box CFO
adri@outtheboxcfo.com



**Shaun
Slabber**

Executive Director
Garde Capital
Shaun@gardecapital.co.za



**Ilzemarie
Knoetze**

Attorney | Conveyancer
BMH Law
ilzemarie@bmhlaw.co.za



**Mbonisi
Ndlovu**

Independent Consultant
LuciaDeKlein
mbonisi@luciadk.com



**Aneria
Bouwer**

Senior Consultant
Bowmans
aneria.bouwer@bowmanslaw.com



**Linda
Sacks**

Independent Consultant
LuciaDeKlein
linda@luciadk.com

Sponsors

With thanks to our sponsors:



www.luciadk.com
+27 64 620 7051
info@luciadk.com