



IV Spain Investors Summit

March 6, 2019 – Palma de Mallorca

Designed for:

Family Business Owners, High-Net-Worth Individuals, Family Offices, Wealth Managers, Investment Advisors, Private Banks, Asset Managers, and Elite Entrepreneurs

Sponsors:

Almira Capital, OD Group, Harbor Ithaka Wealth Management, Columbus Investment Partners, Element Development, FCS Asset Management, Aquasphere Management, Fare Buzz

Speakers:

Eduardo Olier, Presidente **Instituto Choiseul & Partner at Almira Capital** (Spain)
Iñigo Susaeta, Managing Partner, **Arcano Wealth** (Spain)
Jose Luis Jimenez, CIO, **Mapfre** (Spain)
Alberto Ruiz, Managing Director, **Omega Capital** (Spain)
Juan Jesús Gómez, CEO, **Consilio Family Office** (Spain)
Daniel de Fernando, Managing Partner, **MdF Family Partners** (Spain)
Marcus Storr, Head of Hedge Funds, **FERI Trust** (Germany)
Rodrigo Rodriguez, Partner and Portfolio Manager, **BlueCrest Capital** (UK)
Marc Rahola Matutes, CEO, **OD Group** (Spain)
Pedro Yagüez, CEO, **Columbus Investment Partners** (UK)
Cesar Sordo, Partner, **Element Finance Group** (US)
Jose Antonio Parra, Partner, **Almira Capital** (US)
Rafael Alcantara-Lansberg, Managing Partner, **Harbor Ithaka Wealth Management** (US)
Toni Dezcallar, CEO, **Car Collectors Group** (Spain)
Lorenzo Fluxa, Private Car Collector and Investor (Spain)
Javier Basagoiti, Private Car Collector and Investor (Spain)
Hugo Aramburu, Managing Partner, **Diaphanum**(Spain)
Jorge Coca, Managing Partner, **WealthSolutions**(Spain)
Carlos Garcia Ciriza, Managing Partner, **C2 Asesores Patrimoniales** (Spain)
Juan Esquer, Partner, **SV Auriga Family Office** (Spain)
Luis Buceta, CIO, **Banco Alcalá** (Spain)
Pedro Dañobeitia, CEO, **Sabadell Private Bank** (Spain)
Carlos Tejerizo, Head of Wealth Management, **Indosuez Wealth Management** (Lux)
Raul Aznar, CEO, **AZNAR Patrimonio** (Spain)
Fernando Juarez, Senior Family Banker, **Banco Mediolanum** (Spain)
Paul Gomero, Partner, **A&G** (Spain)

- 8:30 Registration & Continental Breakfast**
- 9:00 Chairman's Opening Remarks**
Eduardo Olier, Presidente Instituto Choiseul & Partner at Almira Capital (Spain)
- 9:05 Elite Investor Insights in 2019 - *The last 12 months have seen unexpected events which have dramatically changed financial markets: new U.S. policies, volatility, raising rates by the FED Vs. flat rates in the EU, and more. Top global investors will take a look at these mega trends, geopolitical risks, and economic challenges as we move forward in 2019 and beyond, detailing their compelling assessment of the global landscape***
Moderator:
Eduardo Olier, Presidente Instituto Choiseul & Partner at Almira Capital (Spain)
Panelists:
Alberto Ruiz, Managing Director, Omega Capital (Spain)
Juan Jesús Gómez, CEO, Consilio Family Office (Spain)
Daniel de Fernando, Managing Partner, MdF Family Partners (Spain)
Iñigo Susaeta, Managing Partner, Arcano Wealth (Spain)
Jose Luis Jimenez, CIO, Mapfre (Spain)
- 10:00 Finding High-Performing Investment Opportunities & Solutions for Industry Best Practices**
Managers and industry experts from around the world will present their best solution ideas for the next 12-24 months. Presentations + Q&A.
Presenters:
Marc Rahola Matutes, CEO, OD Group (Spain) | "Top Strategies in Real Estate & Agribusiness"
Pedro Yagüez, CEO, Columbus Investment Partners (UK) | "European Small & Mid-Caps"
Cesar Sordo, Partner, Element Finance Group (US) | "Distressed Real Estate"
Jose Antonio Parra, Partner, Almira Capital (US) | "Investing in Education"
- 11:20 Networking Break**
- 11:40 Presentation – *Portfolio Construction in Times of Volatility and Uncertainty***
Rafael Alcantara-Lansberg, Managing Partner, Harbor Ithaka Wealth Management (US)
- 12:10 Presentation + Panel By Toni Dezcallar, CEO, Car Collectors Group (Spain)**
Panelists:
Lorenzo Fluxa, Private Car Collector and Investor (Spain)
TBC, Private Car Collector and Investor (Spain)
TBC, Private Car Collector and Investor
TBC, Private Car Collector and Investor
- 13:30 Networking Luncheon**

- 14:30** **Wealth Management Challenges - Surviving the landscape of new regulations - MiFID II.**
Transforming the essence transforming the EAFI model.
Moderator:
Josina Kamerling, Head of Regulatory Outreach, European Parliament (Belgium)
Panelists:
Hugo Aramburu, Managing Partner, **Diaphanum** (Spain)
Jorge Coca, Managing Partner, **Wealth Solutions** (Spain)
Carlos Garcia Ciriza, Managing Partner, **C2 Asesores Patrimoniales** (Spain)
Juan Esquer, Partner, **SV Auriga Family Office** (Spain)
Raul Aznar, CEO, **AZNAR Patrimonio** (Spain)
- 15.30** **Private Banking: Best Practices - The panel will explore how regulations are impacting and improving private banks. Our experts will also discuss the consequences of the new regulatory landscape and the latest trends in product architecture and the redefinition of asset allocation and investment strategies**
Panelists:
Luis Buceta, CIO, **Banco Alcalá** (Spain)
Pedro Dañobeitia, CEO, **Sabadell Private Bank** (Spain)
Carlos Tejerizo, Head of Wealth Management, **Indosuez Wealth Management** (Lux)
Fernando Juarez, Senior Family Banker, **Banco Mediolanum** (Spain)
Paul Gomero, Partner, **A&G** (Spain)
- 16:30** **Closing Remarks & Networking**