

MEMBERSHIP

CONNECT · ENGAGE · PROSPER



MEMBERSHIP COMPOSITION

305

PRINCIPALS

391

FAMILY MEMBERS

212

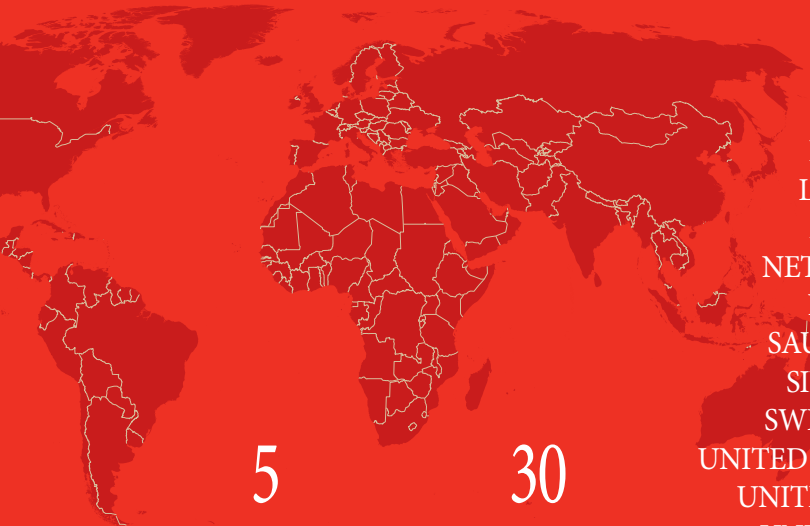
NEXT GENERATION

292

FAMILY OFFICE EXECUTIVES

COUNTRIES REPRESENTED BY THE MEMBERSHIP

ANDORRA
ARGENTINA
AUSTRALIA
BELGIUM
BRAZIL
CANADA
CHINA
CONGO
FINLAND
FRANCE
GERMANY
GUATEMALA
HONG KONG



5
CONTINENTS

30
COUNTRIES

INDIA
ISRAEL
ITALY
KUWAIT
LEBANON
MEXICO
NETHERLANDS
NIGERIA
SAUDI ARABIA
SINGAPORE
SWITZERLAND
UNITED ARAB EMIRATES
UNITED KINGDOM
UNITED STATES

AVERAGE TENURE OF MEMBERSHIP

8.9
YEARS



CAMPDEN FAMILY CONNECT

*“Peer Networking and Education on a Global Scale
for Families of Substantial Wealth.”*

Campden Family Connect (CFC) is the pre-eminent membership network for India’s ultra high net worth community, family business owners and their family offices. Campden Family Connect delivers both local and global networking opportunities and access to international best practice family business, family office and wealth management education. *(Membership is carefully controlled on a qualified, by-invitation-only basis).*

Campden Family Connect is a joint venture between Campden Wealth, which has operated at the forefront of innovation in the global private wealth community since 1997 and the Patni family, who have been pioneers of the family office space in India, since 2006.

Operating from an integrated global platform, Campden Family Connect provides India’s ultra affluent community with:

- Global connectivity and networking opportunities through private events, facilitated introductions & online through Memberlink®
 - International best practice content and knowledge support through proprietary research and publications
 - Generational education in association with globally renowned Universities & Business Schools
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MEMBER COMMENTS

“

Gaining access to a global community of like minded peers and learning & sharing ideas has been invaluable, throughout the transition of control within our family business.

Member since 1999

I would not be able to do what was entrusted to me by my father without the education, interaction and fun provided by Campden.

Member since 2005

In addition to gratitude, one of the strongest contributors leading to happiness is a sense of belonging to a community. I have to say that [Campden has] created an extraordinary community and I benefit from it by a large multiple of what I bring to it. Thanks for all you do.

Member since 2008

”



CAMPDEN FAMILY CONNECT MEMBERSHIP

Campden Family Connect, incorporating the Campden Club and the Institute for Private Investors (IPI), is India's pre-eminent wealth membership network for:

- **Multigenerational business-owning families**
- **Families of substantial wealth and their family offices**
- **Private Investors**

Connecting you to global peer community of over **1,300** family members from **30** countries.

Campden Family Connect provides networking opportunities and unrivalled support to families and their next generation members through:

- **Global & regional family wealth events**
- **Online communication with members around the world**
- **Co-investment workshops**
- **Member profiling and connections**
- **Research, reports & intelligence**
- **Multigenerational education programmes**

Members join Campden Family Connect to:

- **Gain access to a global network of peers**
 - **Co-Invest with like-minded families**
 - **Share and learn in a safe harbour environment**
 - **Make better decisions for their family legacy**
 - **Build trusted friendships and relationships**
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MEMBERLINK® - MEMBER'S ONLINE COMMUNICATION TOOL

Campden Family Connect members utilise this secure online platform to engage and stay connected. They gain invaluable insight on various topics and are informed of club activities and developments.

MEMBER CONVERSATIONS




WEALTH MANAGEMENT

“We are looking for the first time at setting up a “family bank” to support family members in their individual businesses. Does anyone have any experience with this? We are starting from the ground up, so I would welcome any advice, opinions etc that you would be willing to share.”

FAMILY OFFICE

“I am considering outsourcing our accounting and tax return preparation. Can you tell me if you have outsourced your accounting function and what issues you have faced in doing so?”



“I’m using the [members conversations] to great advantage in my family’s search for a family facilitator. Thanks for creating Memberlink®”

Private Investor

MEMBER EVENTS

Campden Family Connect members enjoy access to all networking events held throughout the year. These include:

- BRIEFINGS** Members only meetings, facilitated by ‘thought leaders’
- CONFERENCES** Peer-to-peer events engaging families, family offices, professional experts and ‘thought leaders’
- FORUMS** Members only strategic investment conferences in the US once a year
- ROUNDTABLES** Peer-to-peer closed door sessions led by a professional partner
- WORKSHOPS** Members only co-investment club meetings

Campden events deliver:

- Confidential, efficient relationship building within a vetted community
- High quality content that is trusted for its substance, accuracy and timeliness
- Receptions and private dinners in a safe harbour environment

“Campden has produced over 275 events hosting 24,000 family members, in major financial city-centers around the world.”



MEMBER'S CO-INVESTMENT CLUB

Campden Family Connect members benefit from access to independent workshops through which they may exchange private equity style co-investment opportunities, across a diversity of sectors and geographies.

The workshops offer:

- Peer-to-peer networking and information exchange with like-minded, active liquid investors
- Discreet access to off-market, cross border, proprietary deal flow
- Online access to deal information and investment ideas

“Co-investment requires one key ingredient that you deliver...trust. Thank you Campden.”

Family Principal



MEMBER CONNECT

Campden Family Connect members benefit from facilitated introductions to other members of the community. Upon joining, a personalised profile is created, that allows us to connect you with fellow peers who share similar interests and objectives.

This bespoke service will extend your regional and global reach for you, your Family Business and Family Office.

All introductions are carefully managed and by-request only. Whether visiting another country or looking at family co-investment opportunities, you have the chance to connect with members that are vetted and open to joint ventures.

Membership is carefully controlled on a qualified, by-invitation-only basis. The community respects the safe harbour environment and there is a written code of conduct to which all members adhere.

“I found meeting and discussing my concerns and ideas with like-minded people in a private environment invaluable.”

Head of Family Office, Finland

*R***REPORTS, RESEARCH AND PUBLICATIONS**

Campden Family Connect members receive educational reports, research and publications pertaining to issues impacting their family business, family office and family wealth.

TAILOR-MADE REPORTS

Quarterly email bulletins encompassing articles, presentations and white papers on considered subjects selected by our members.

CAMPDEN RESEARCH

Our global and regional research offers an unparalleled understanding of the values, priorities and concerns of families of substantial wealth.

CAMPDEN PUBLICATIONS

Our Family Business and Family Office publications deliver knowledge, insight and vital business intelligence that support decision making.

REAL TIME NEWS

Campdenfb.com provides real time news from experts in finance, investment, governance and lifestyle.

GENERATIONAL EDUCATION

Campden Family Connect members enjoy privileged access to all Campden generational education programmes held throughout the year.

These fee paid programmes allow participants to increase their depth of knowledge in key areas of wealth management, succession planning and family business governance through both theory-based learning and live case studies. The programmes provide the unique opportunity to meet and work with others, who like themselves, are part of a family with substantial assets.

These programmes are held in collaboration with leading global Universities and led by world class faculties including:



Since August 1999, our executive education programmes have been attended by 940 members from 42 countries.

*“This was the best educational programme I have attended.
As a next generation family member with no financial
background, it gave me the tools to ask the right questions
and understand the answers from money managers.”*

Next Generation Family Member

TYPES OF MEMBERSHIP

Annual membership fees include access to all events, facilitated introductions, communication online with fellow members via Memberlink®, participation in co-investment workshops and receipt of reports, research and publications.

Campden Family Connect recognises that families have different needs and objectives. Accordingly we offer the following:

INDIVIDUAL MEMBERSHIP

- The named principal only

FAMILY MEMBERSHIP

- The named principal as well as one other individual from the family or family office
 - A next generation family member may attend events with the named family principal
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SUMMARY OF MEMBERSHIP BENEFITS

Campden Family Connect members benefit from:

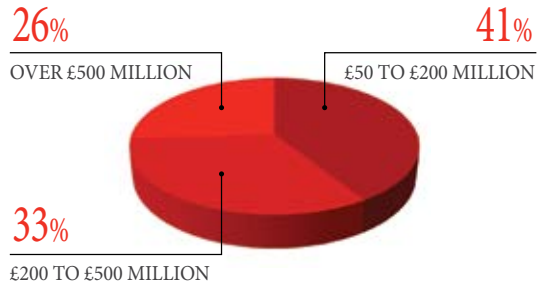
- Access to a global family community
- Participation in private member briefings
- Attendance at conferences, roundtables and co-investment workshops
- Connection through our online membership platform, Memberlink®
- Personalised introductions to other members of the community
- Bespoke wealth management intelligence reports and data
- Family Business and Family Office publications
- Priority application when applying for generational education programmes

All members benefit from preferential access to the Campden portfolio of events and services including one Institute for Private Investors Forum in the US.

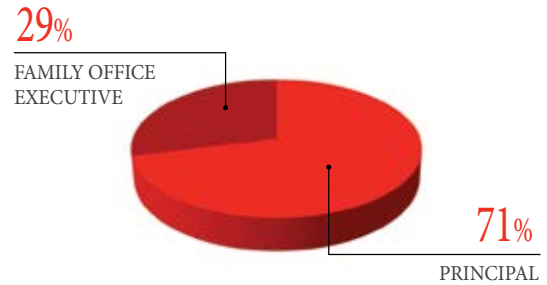
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MEMBERSHIP PROFILE

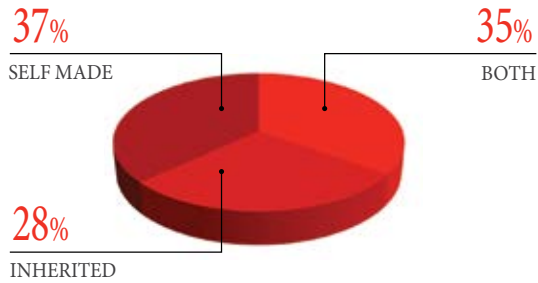
TOTAL ASSETS OF FAMILY



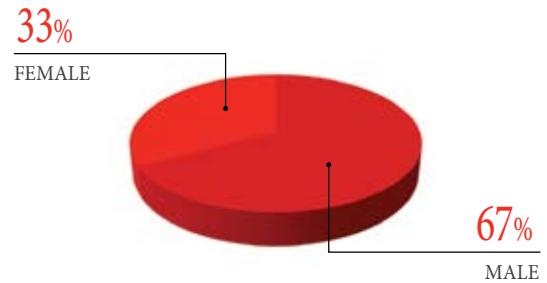
FAMILY MEMBER ROLE



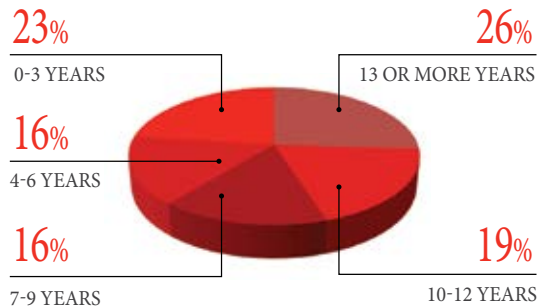
ORIGIN OF WEALTH



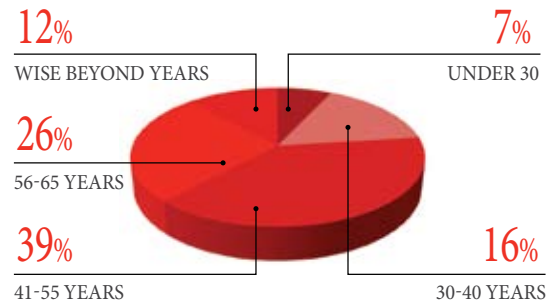
GENDER



TENURE



MEMBER AGE





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CAMPDENFAMILYCONNECT.COM

“It requires a great deal of boldness and a great deal of caution to make a great fortune, and when you have it, it requires ten times as much skill to keep it.”

Ralph Waldo Emerson

NETWORK · EDUCATION · SAFE HARBOUR