



Family Offices

Who? How? Where? What? & Why?

STEP (Guernsey) Conference 2023

Maya Prabhu

Managing Director – J.P. Morgan Private Bank

Head of Wealth Advisory for the United Kingdom, Europe, the Middle East and Africa

Maya leads the Wealth Advisory practice across the EMEA region. She advises families on strategies to plan for and support the harmonious transition of their family wealth and family businesses to the next generation. Her areas of focus include developing family governance and communication strategies, next generation engagement and development, establishing family offices and in crafting effective and rewarding philanthropy strategies.

Maya holds practicing certificates in Family Business Advising and Family Wealth Advising from the Family Firm Institute (Boston, USA), a Certificate in Executive Coaching from the Henley Business School (University of Reading) and is an accredited mediator from Regents University. She is a member of the teaching faculty for the Family Firm Institute's GEN courses and for the Society of Trust and Estate Practitioner's Professional Postgraduate Diploma in Private Wealth Advising.



Siena Gold

Partner – Harbottle & Lewis

Siena Gold advises individuals and family offices, trustees and financial institutions representing them on wealth and succession planning, family governance, philanthropy and cross-border tax advice.

She has particular expertise in assisting internationally mobile individuals and helping clients with a presence in multiple jurisdictions who have substantial interests in Europe, North America and the Middle East. She especially enjoys helping clients address particularly complex issues or difficult family dynamics where they are looking to avoid litigation.

Siena won the UK Rising Star of the year award in the Chambers High Net Worth Awards 2021. The judges noted she “continues to establish herself as one of the London market’s leading private wealth lawyers” with their sources saying she is “absolutely one to watch; she is really fantastic.”



David Bowen

**EY UK&I Family Office Advisory Services Leader;
Partner, Private Client Services, Ernst & Young LLP**

Family office professional. Advises complex and wealthy families on family office design, transformation, operation and institutionalization. Keen Bristol rugby supporter and youth rugby coach.

David is a partner in the Private Client Services team in London and leads the UK&I Family Office Advisory practice. He is experienced in advising some of the world's wealthiest families on designing and building single-family offices, as well as benchmarking, reviewing and transforming existing single-family offices and wider organizational structures.



Ajay Wiltshire

Managing Director – Saffery Champness (ME) Limited, DIFC, Dubai

Advisor to international entrepreneurial and high-profile clients particularly with regard to exploitation of rights, asset protection and international structuring. He has been in private practice and in-house roles in London, Jersey and Guernsey and in 2011 he was recognised as one of the UK's Top 35 under 35 private client practitioners.

Ajay is the Middle East representative of the Private Taxes Committee of the International Bar Association and he is a regular speaker at international conferences. He was admitted to the Law Society of England & Wales in 2001 and remains a practicing Solicitor.

Since 2018, Ajay divides his time between Guernsey and Dubai, where he is a Director of the firm's DIFC operation.





KEY QUESTIONS

Our guests share their expertise and indulge in lively
debate...

**The Family's Office, not the
same as the family office
structure?**

**“Same same but
different...”**

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What?
Is it the structure or
the governance that is
key?

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**Is everyone in and around
the family on the same
page? What should you
do if they're not?**

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**Who makes a good family
office leader? How should
clients be thinking about
recruitment for their family
office?**

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**With strong family leadership
does the structure meekly
follow?**

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**Operators to Owners.
Running the structure
versus running the business.
Is there a line in the sand?**

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Where?

**Are the Crown Dependencies
losing ground to innovation in
emerging jurisdictions such as
DIFC or ADGM?**

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**AUDIENCE
VOTE**

**What makes a leading
jurisdiction? Uncertainty
following the collapse of
significant institutions?**

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**Are families intimidated
by offshore structures
perceiving them to be
remote, cumbersome
and expensive?**

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**AUDIENCE
VOTE**

**Complex structure or
simple limited
company with different
share classes?**

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Are the Crown Dependencies regulating themselves out of the market?

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AUDIENCE
VOTE

**Has competition,
consolidation and
commoditisation amongst
service providers
compromised the service?**

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**AUDIENCE
VOTE**

**Is the nature and function
of family offices evolving?
What does the family office
of the future look like?**

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A.I.
Yay?
or
Run Away!!!

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AUDIENCE
VOTE



Any Questions?

THANK YOU!

