



Latam Family Office
Investment Summit

Post Event Report

20-21 March 2023



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Overview

Another wonderful event in Mexico City with faces both familiar and new, including family offices and service providers from around the region and beyond...

The Latam Family Office Investment Summit was an opportunity for family offices, and those who want to do business with them, to gather in an informal and informative environment in beautiful Mexico City.

We discussed the most relevant and timely topics affecting global business today, as well as going in-depth on the region. Adding her input to this year's program was Alba Medina, who brought her experience as an investor, serial entrepreneur and as a member of over 20 national & international boards.

Built into our programme were our usual multiple informal networking opportunities, where delegates could meet each other and begin meaningful real-world collaborations that we know will produce big results.

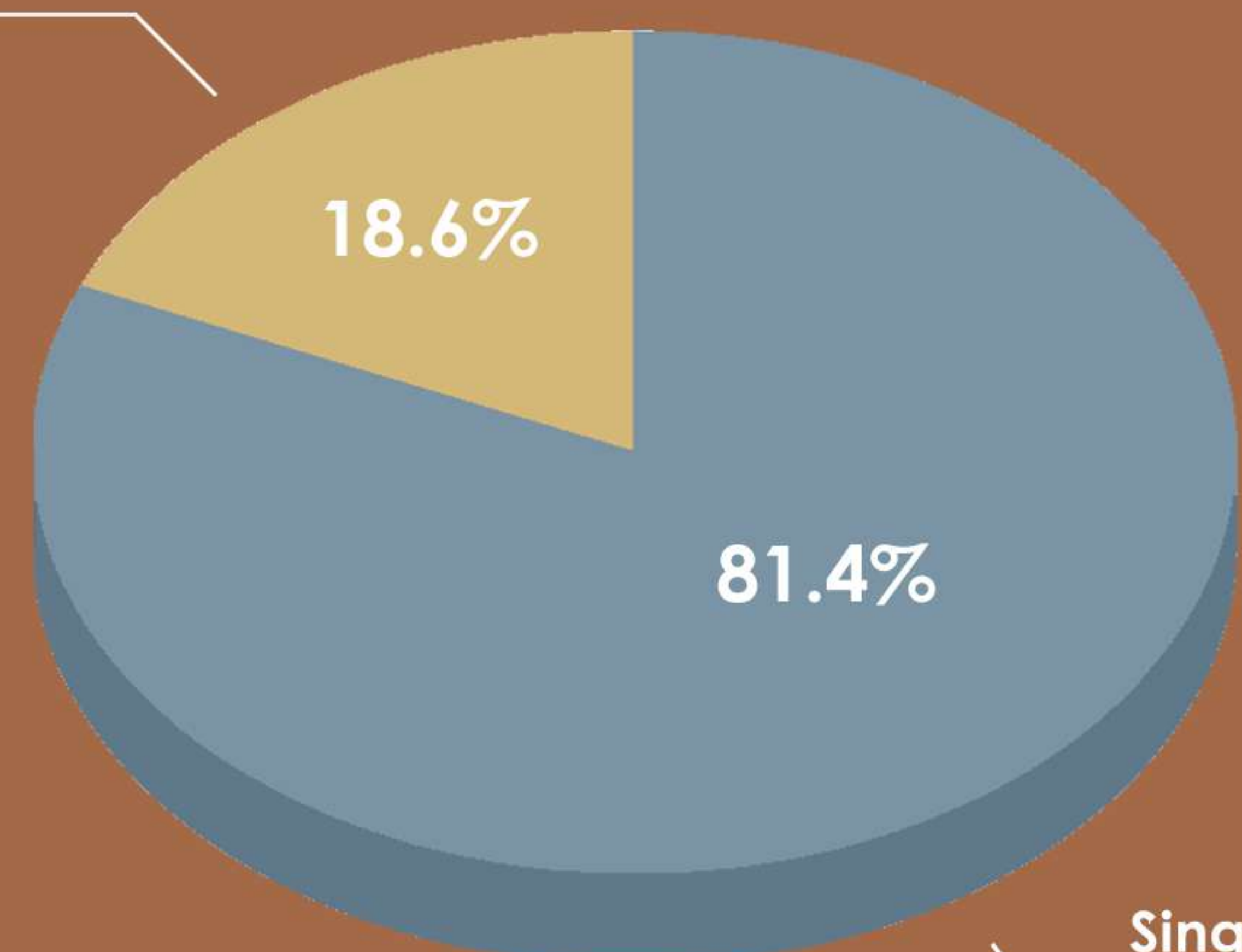
Stats / Ratio

136 Single Family Offices

31 Service Providers

130 One-To-One Meetings

31
Service Providers



136
Single Family
Offices



Program

Day 1

A star-studded program provided non-stop inspiration and insight for our guests, beginning with a very warm welcome from **Martha Delgado Peralta** – the Undersecretary for Mexico’s Multilateral Affairs and Human Rights Ministry of Foreign Affairs. This opening speech was an invitation to those with an interest in investing in Mexico, creating a positive environment for our family offices and service providers to grow their ambitions in the region over the following two days.

From here we went on to hear from **Kat Echazarreta**, the first Mexican-born woman in space. Her co-stars on the first panel included Oscar-nominated film producer **Gastón Pavlovich**, explorer **Josh Bernstein**, **Match Hospitality’s José Luis Font**, and **Héctor Sulaimán** of the **Scholas Foundation**. This diverse panel found common ground in the ways they bring creativity into what they do, and how they use it to pursue their professional goals.

More creative and cultural discussion followed, with a panel on art as an asset class, and a session about fostering entrepreneurship and managing innovation. This was followed by a presentation on the future of aviation technology, with an exciting look at what the future might hold for consumer air travel.

Managing conglomerates and the challenges of becoming an entrepreneur were covered by the following two panels. A presentation by Colombian serial entrepreneur **Santiago Botero Jaramillo**, **SBOLab Company Builder** followed, and then all delegates joined together for a gala dinner hosted by **Inclusive Logistics**.

Day 2

Day two began with an exploration of Latam as the sleeping giant of investment, with **David Geison**, Country Manager of **Mercado Libre Mexico & VP Marketplace Mexico**.

We then followed with a panel on impact investing and sustainability, opportunities in debt capital markets, and leveling up Latam through healthcare, before taking a networking coffee break. Mid-morning sessions were a panel on hitting the unicorn valuation, followed by a presentation on trading **Algorítmico**, and a presentation on reaching the global methane pledge by **Agrivert**.

A quick overview of our tips for the next big thing was followed by a panel on the power of diversity and inclusion in all areas of business.

Then it was time for another networking break, this time a lunch hosted by **FOREX.com**. Afternoon sessions began with a panel on private equity and venture capital, then the current state of fintech, and Web 3 cyber-security and deep tech.

The future of mobility was covered by an expert panel, and then we heard from **Nexus Capital** and **Nexus Iberia** on what you need to know before you take your company to public markets.

After the closing remarks and thanking our delegates and speakers, everyone headed to the final cocktail reception hosted by **alfred**.



Location

Taking place at the stunning Four Seasons hotel in the middle of Mexico City, the summit was well placed to attract family offices and investors from around Mexico as well as being easy to reach for international delegates.

Our venue was a large ballroom venue where all program sessions took place, with a breakout room for networking, meetings and refreshments.

We also took the event outside to the courtyard on the final evening for a cocktail event to close the summit. It was an enjoyable and informative event for all involved, and the setting played a very special part.



A special thanks

The event could not have gone ahead without the support of the organizations who lent their time and resources to its delivery.

Our supporter for this event was **Qatar Financial Center**, our media partner was **Business Insider Mexico**, our summit partner was **Aero**, and our co-branding partners were **alfred** and **Exness**.

We thank all of them for the vital role they played in bringing everyone together.



About us

The Alduaij family office has a long and glorious history in Kuwait as one of the most prominent and respected business forces. The Alduaij family business, Alea Global, has won several awards including The European Award, and the CEO Award two years running.

Head of the family office, Mohammad Alduaij, has won the Man of the Year award for his work connecting other equally exciting and well-respected family offices around the world.

Through our networks, we have formed strong personal and professional relationships with other family offices across the globe, all sharing much common ground and a willingness to work together.

Mohammad Alduaij has been a conference speaker for the past 10 years, appearing at events all over the world. It was during his time touring the conference circuit that Mohammad first thought of bringing together his conference experience, and his special insight into the world's most prestigious family offices.

The result is a conference that unites family offices with each other, as well as giving businesses and entrepreneurs unprecedented access to this unique and powerful network.



What Our Attendees Have Said

I work for foundations that are passionate about making the world a better place, so coming here to Mexico and getting exposure to Latin American family offices and people who share a passion for making the world better, it's been a great conference for me. I've met a nice range of people from entrepreneurs to family office managers to families themselves because they believe passionately in their missions. Every seminar and every meal has been a wonderful opportunity to connect with people.



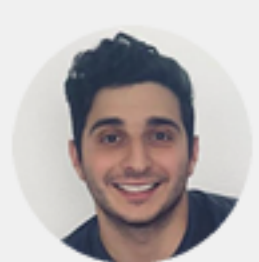
Josh Bernstein
First Light Group

This is my first Alea Global Group event, it will not be my last. After the pandemic I'm totally Zoomed out and you've got to come to events like this. There's a passion as the world emerges out of covid to re-engage, not via Zoom, and take the world forward and start building the economies for the losses that they've sustained. From a family office standpoint there's capital to invest. It's an excellent platform to progress your interests. It's the only opportunity to meet people that otherwise you wouldn't have the opportunity to meet and throughout the two-day event I've met a number of individuals where I think the prospects for completing investment deals in those sectors are very tangible. That just wouldn't have happened if I hadn't come, and I've already registered for my attendance at Dubai and I might actually pop into Lake Como.



Ian George
George Wicks Limited

Thank you for having me. I really enjoyed the panel and the event all together. The quality of guests was incredible and the content was very compelling. You guys held an amazing event.



Abdo John Hajj
Type One Ventures

The event is clearly bringing together a lot of people, from family offices, advisors and also potential suppliers to the family offices to bring new investments and opportunities to everybody. One of the things I came here for was to try and understand whether Latin America was a market that would be worth Agrivert trying to get into, and there's some early indications that it might be somewhere that will be good for anaerobic digestion moving forwards.



Phil Earl
Agrivert

These are all family offices who are probably the biggest leaders in all the private sector. We want to invite them to have more girls in the seats and show their talents in their businesses. So ultimately what we came here to say is to take a chance and it's a great opportunity and a great business.



Eglantina Zingg
Goleadoras.org

My industry is a blooming industry that is inquiring about everything related to technology and to new ventures. We are integrating more into the business sector and I was fortunate enough to be invited here to have this networking session with extraordinary people from all over the world that allow me to explore ideas and partnership mergers and acquisitions, new technologies, anything that can take our company and our industry to the next level. I'm really glad to have been meeting people that have made extraordinary achievements or are about to make extraordinary achievements. Entrepreneurs who have an enormous strength of pushing their business and their agenda, innovative people, people who are open to explore ideas of how to integrate their sectors with other sectors and come up with new ideas, new ventures, risk takers – and in my kind of business you've got to be a risk-taker.



Gaston Pavlovich
Fábrica de Cine

