



CAMPDEN CLUB
MEMBERSHIP

CONNECT · ENGAGE · PROSPER



MEMBERSHIP COMPOSITION

356

PRINCIPALS

416

FAMILY MEMBERS

237

NEXT GENERATION

292

FAMILY OFFICE EXECUTIVES

COUNTRIES REPRESENTED BY THE MEMBERSHIP

ARGENTINA
 AUSTRALIA
 BELGIUM
 BRAZIL
 CANADA
 CHINA
 FINLAND
 FRANCE
 GERMANY
 GUATEMALA
 HONG KONG
 INDIA
 INDONESIA
 IRELAND
 ISRAEL



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CONTINENTS

43
COUNTRIES

ITALY
 KUWAIT
 LEBANON
 MONACO
 MEXICO
 NETHERLANDS
 NIGERIA
 SAUDI ARABIA
 SINGAPORE
 SWITZERLAND
 SPAIN
 THAILAND
 UNITED ARAB EMIRATES
 UNITED KINGDOM
 UNITED STATES

AVERAGE TENURE OF MEMBERSHIP

8.9
YEARS



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

Since 1997 Campden Wealth has operated at the forefront of innovation and best practice in the global private wealth community. Its family business, office, wealth and investment conferences held in key cities around the world, its flagship publications, *CampdenFB* (Family Business) and *CampdenFO* (Family Office) together with its proprietary research, have all informed and facilitated dialogue amongst families of substantial wealth.

In 2011 Campden enhanced its global reach with the acquisition of the Institute for Private Investors (IPI), the leading pre-eminent US membership network of significant private investors, founded in 1991 and with the establishment of Campden Family Connect PVT. Ltd, a joint venture with the Patni family in Mumbai, India in 2015.

Operating from its integrated global platform, Campden focuses on providing today’s private wealth community with:

- **Global networking opportunities through private events and online through Memberlink®**
 - **Knowledge support through proprietary research and publications**
 - **Generational education in association with globally renowned Universities & Business Schools**
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*M*EMBER COMMENTS



I will never be one to spend my life studying the nuances of finance, but the Campden meetings have given me the knowledge and education to know the right questions to ask, avoid costly mistakes and make better decisions.

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 CLUB MEMBERSHIP

Campden Club, incorporating the Institute for Private Investors (IPI), is the pre-eminent wealth membership club for:

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

By joining the Campden Club, you become part of a global community of over **1,400** family members and family offices from **43** countries.

Campden Club Membership provides networking opportunities and unrivalled support to families and their next generation 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 the Campden Club to:

- **Become better stewards of their wealth**
 - **Benchmark against peers**
 - **Make better decisions for their family legacy**
 - **Build trusted friendships and relationships**
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MEMBERLINK® - MEMBER'S ONLINE COMMUNICATION TOOL

Campden members utilise this secure online platform to engage and stay connected. They gain invaluable insight on topics pertaining to wealth management issues affecting the membership 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 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
- ROUNDTABLES** Peer-to-peer closed door sessions led by a professional partner
- WORKSHOPS** Members only co-investment club meetings
- SOCIAL** Members only social and sporting events

Campden events deliver:

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

“Campden Wealth has produced over 250 events hosting 20,000 family members, in major financial city centres around the world.”

M **MEMBER'S CO-INVESTMENT CLUB**

Campden 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 Wealth.”

Family Principal

MEMBER CONNECT

Campden 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 and your 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 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 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 over 1,300 members from 49 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

*T*YPES 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 recognises that families around the world 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 members benefit from:

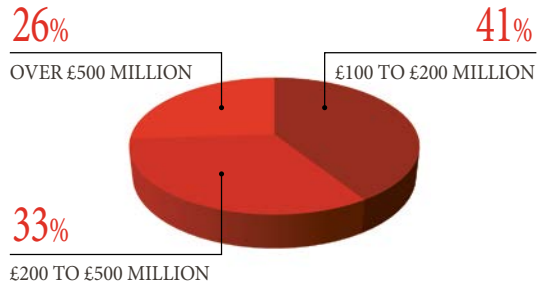
- Access to a global community of families, family offices and private investors from 43 countries
- Participation in private member briefings
- Attendance at conferences, roundtables, co-investment workshops, social and sporting events
- Connection through our online membership platform, Memberlink®
- Personalised introductions to families with aligned interests
- 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 Wealth portfolio of events and services including an Institute for Private Investors Forum in the US.

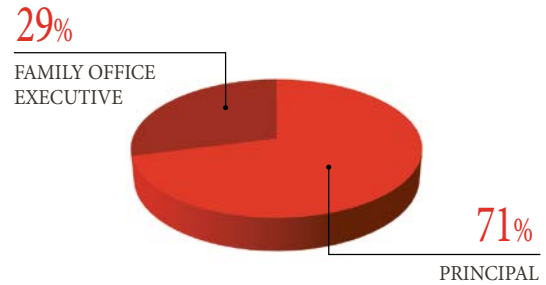
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MEMBERSHIP PROFILE

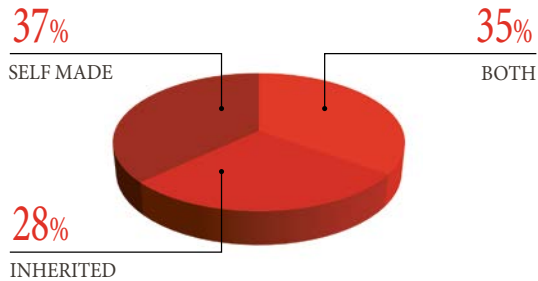
TOTAL ASSETS OF FAMILY



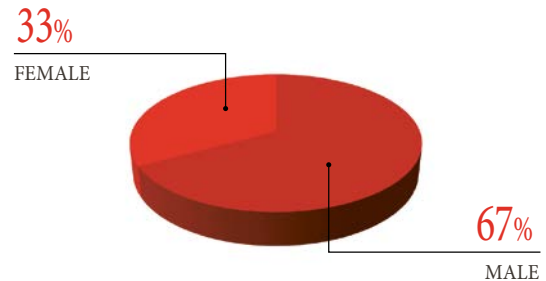
FAMILY MEMBER ROLE



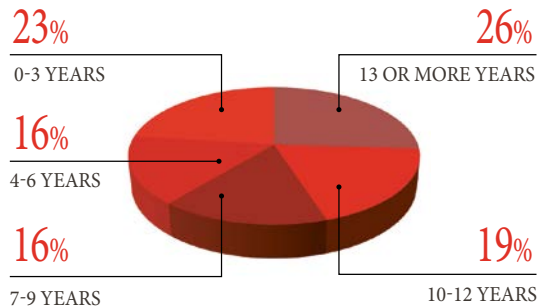
ORIGIN OF WEALTH



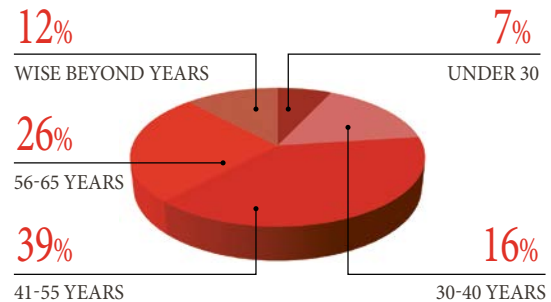
GENDER



TENURE



MEMBER AGE



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Campden Wealth

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INSTITUTE
for
PRIVATE
INVESTORS



CAMPDENCLUB.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