CAPITAL & LEGACY FORUM

THE CONVERSATION BEHIND THE CAPITAL

10 NOVEMBER 2026 | KOFISI KASKAZI, NAIROBI

07h30	**REGISTRATION & WELCOME COFFEE**
09h00	WELCOME & OPENING REMARKS **Terryanne Chebet**, MC
09h10	OPENING KEYNOTE **FROM WEALTH CREATION TO WEALTH PRESERVATION** **John McDonald**, Director, Waugh McDonald
09h30	PANEL **THE WORLD BEYOND THE OPERATING BUSINESS: A FAMILY OFFICE APPROACH TO GLOBAL ALLOCATION** *Building a complementary and resilient global portfolio alongside traditional assets and cashflows. The case for global equities, assets, alternatives and managing liquidity.* **Moderator: John McDonald**, Director, Waugh McDonald **Mark Dunford**, CEO, Knight Frank Kenya **Dhaval Shah**, Head of Wealth Management, Zamara **John Mwaniki**, Head of Projects & Structured Finance, CPF Capital & Advisory
10h05	KEYNOTE **REDEFINING GENERATIONAL LEGACY** **Akshay Shah**, Group Executive Director, Silafrica
10h25	FIRESIDE CHAT **THE FUTURE OF BUILDING BRANDS: FROM MADE IN AFRICA TO DESIRED GLOBALLY** *Africa has been viewed primarily as a source of raw materials, commodities and natural resources. It is now evolving as a place where brands - and ideas in technology and culture - are being created, developed and exported. Can they create enduring legacies?* **Facilitator: Farook Jamal**, Managing Director, Mark Masons Investments (UK/Asia) IN CONVERSATION WITH **Michael Aldridge**, CEO, KOFISI **Hooman Ehsani**, CEO, Village Market **Ahsan Manji**, MD, Groupaco Holdings
11h00	PRESENTATION **Michael Aldridge**, CEO, KOFISI
11h15	**COFFEE AND NETWORKING BREAK**
11h45	FIRESIDE CHAT **THE FAMILY BEHIND THE CAPITAL** *The journey from financial services to real estate and beyond.* **Facilitator: Saif Ahmedi**, Partner, DeaconCapital IN CONVERSATION WITH **Dhruv Pandit**, Executive Chairman, Hodari Advisory Services

12h10

PANEL

STRUCTURING FAMILY WEALTH IN PRACTICE: STRUCTURES, GOVERNANCE & LEGACY PLANNING

Who should own, control and benefit from family wealth, and how to choose the right structure (foundations, holding companies, trusts) for different family circumstances, with practical and tax considerations and planning for future change.

Moderator: Martha Mbugua, Managing Partner, Martha Mbugua Law Office
Mike du Toit, Family Business Succession Planning Consultant
Claire Machin, Commercial Director, Private Wealth, Suntera Global
Ranee Nanji, Executive Director, SVG Group

12h45

PRESENTATION

THE CHARTER IN THE DRAWER: WHY FAMILY GOVERNANCE FAILS AFTER IT'S SIGNED — AND HOW TO MAKE IT LIVE

Jean Meeks-Koch, CEO/Managing Director, PP Generational Continuity Consultancy

13h00 — **LUNCH**

14h00

PANEL

WHERE SHOULD THE NEXT $10M GO?

A practical look at capital allocations for a family office — a discussion on balancing liquidity, preservation, growth, opportunity capital and long-term strategic investments.

Moderator: Raghav Gandhi, CEO, ALP
Bobby Patel, Managing Director, CrossBoundary
Jan Martin Witte, COO: Asset Management, Cygnum Capital
Dean Lo, Senior Relationship Manager, Intercontinental Trust
Ann Mugweru, Executive VP - Diversified Industries & Real Estate, Stanbic

14h40

PRESENTATION

THE INTERNATIONAL FAMILY — RESIDENCY, CITIZENSHIP & WEALTH MOBILITY

How international mobility, residency and citizenship considerations interact with family wealth planning, investment structures and long-term succession

Raymond Nel, Associate Director Private Wealth, Henley & Partners

14h55

PANEL

DO YOU REALLY NEED A FAMILY OFFICE?

Family office, multi-family office or virtual family office? Understanding the functions required to manage complex family wealth and the most appropriate way to access them.

Moderator: Dianah Mureithi, Partner, Sterling Law
Saif Ahmedi, Partner, DeaconCapital
Stella Wambugu, Director, Wealth Management, AXYS
Immaculate Mbithe, VP, Real Estate Finance, Stanbic

15h30

PRESENTATION

ENDS OF THE EARTH, THE ECONOMICS OF TENTED LODGES IN EXTRAORDINARY PLACES

Jerry Shang, MD, Xanaland Mingyoun Hospitality

15h45

PANEL

THE 100 YEAR FAMILY: FROM HEIRS TO STEWARDS

The next generation for ownership, investment decision-making, governance and the responsibilities that come with family wealth, and building for the next 100 years.

Moderator: Sunny Vikram, Partner - Deals Tax and Business Structuring Services, PwC Kenya
Roshni Agarwal, Head of Growth & Strategy, Full Circle Africa
Sumit Dodhia, Director, Paras Industries
Jean Meeks-Koch, CEO/MD, PP Generational Continuity Consultancy

16h20	FIRESIDE CHAT **BRIDGING THE GAP BETWEEN PRIVATE EQUITY AND FAMILY OFFICES** *Bridging the gaps for deal-making, overcoming the frictions, and partnering for growth.* **Moderator: Vruti Shah**, Partner, Bowmans **IN CONVERSATION WITH** **Edzard Scherpbier**, Associate Principal, Metier **Jonny Jacobs**, Co-Founder, Longevity Development
16h50	**FORUM CLOSE & COCKTAIL FUNCTION HOSTED BY KOFISI**