

Peer Insights

R E P O R T

Q&A with Denny Chared Founder & CEO of DC Finance

Principle Series:

Family Office Insights sits down with Denny Chared, Founder & CEO of DC Finance, an Israeli based organizer of international family wealth conferences, to discuss his business model and his plans for growth in the future.



Family Office Insights is a voluntary, “opt-in” collaborative peer-to-peer community of single family offices, qualified investors and institutional investors.

Learn more at:
FamilyOfficeInsights.com

Q: What is your professional background? Why did you decide to launch a conference business in Israel?

A: I was a financial journalist and an economist in Israel covering Wall Street for several years and one of the first online financial journalists working for Globes Business Daily. In 2003, I decided to launch DC Finance. Since its inception, the firm has grown to produce and raise capital for more than 18 conferences each year, attended by thousands of business professionals from Israel and abroad. It has become one of Israel's leading financial conference organizer reaching high-net-worth individuals, institutional investors and the top managements of Israel's eminent business community.

We see a great deal of growth in Israel, which is why I decided to base my company there. New wealth is continuously being generated through IPOs and start-ups and the older wealth reached the third generation stage where 90% of family businesses don't make it past that generation to the next. There is a dire need for consultants and information in this space, which we can provide. I've also found that many high-net-worth Jewish individuals have been moving to Israel and planning to call it home for tax reasons, another opportunity for our business.

Q: What makes DC Finance unique throughout the conference space?

A: We manage prominent financial conferences for ultra-high-net-worth individuals (\$100M and upwards) including the World's Largest Family Office and Wealth Management Conference in Israel (600 Single-family offices and families) New York City and Florida (more than 200 SFOs and UHNW families).

Our conferences offer a unique opportunity for our sponsors to get in direct touch with many potential clients at one place in a very short period of time. Some of our attendees are very hard to reach and are not seen in similar events, partially due to our unique reach to the high-net-worth Jewish community and our close collaboration with single family offices and private business clubs.

At our events, we include some topics you won't see in similar events such as "innovation" and "homeland security" that makes us different. High-net-worth families want to learn about things that might be outside of their own wheelhouse, like looking at new tech start-ups for instance. There are many businesses that can benefit from these families potentially investing in them.

Q: You believe in collaboration within the wealth management and family office community. Why is that? How has the helped your business?

A: We work with a number of family office groups that some might consider our competitors, but we see them as collaborators. We also pride ourselves on our outreach to the Jewish community even beyond Israel more so than other groups.

Q: What conferences do you have planned for the rest of the year?

A: We have three planned events in New York City and Miami this year that will bring over 500 ultra-high-net-worth family members, representing over \$200 billion in assets under management.

June 3, 2015 – NYC Meeting at the Friars Club (www.thenycmeetings.com) – a smaller, more intimate conference for 60-80 UHNWI and SFO execs, in which the topics in hands will be discussed much more in depth.

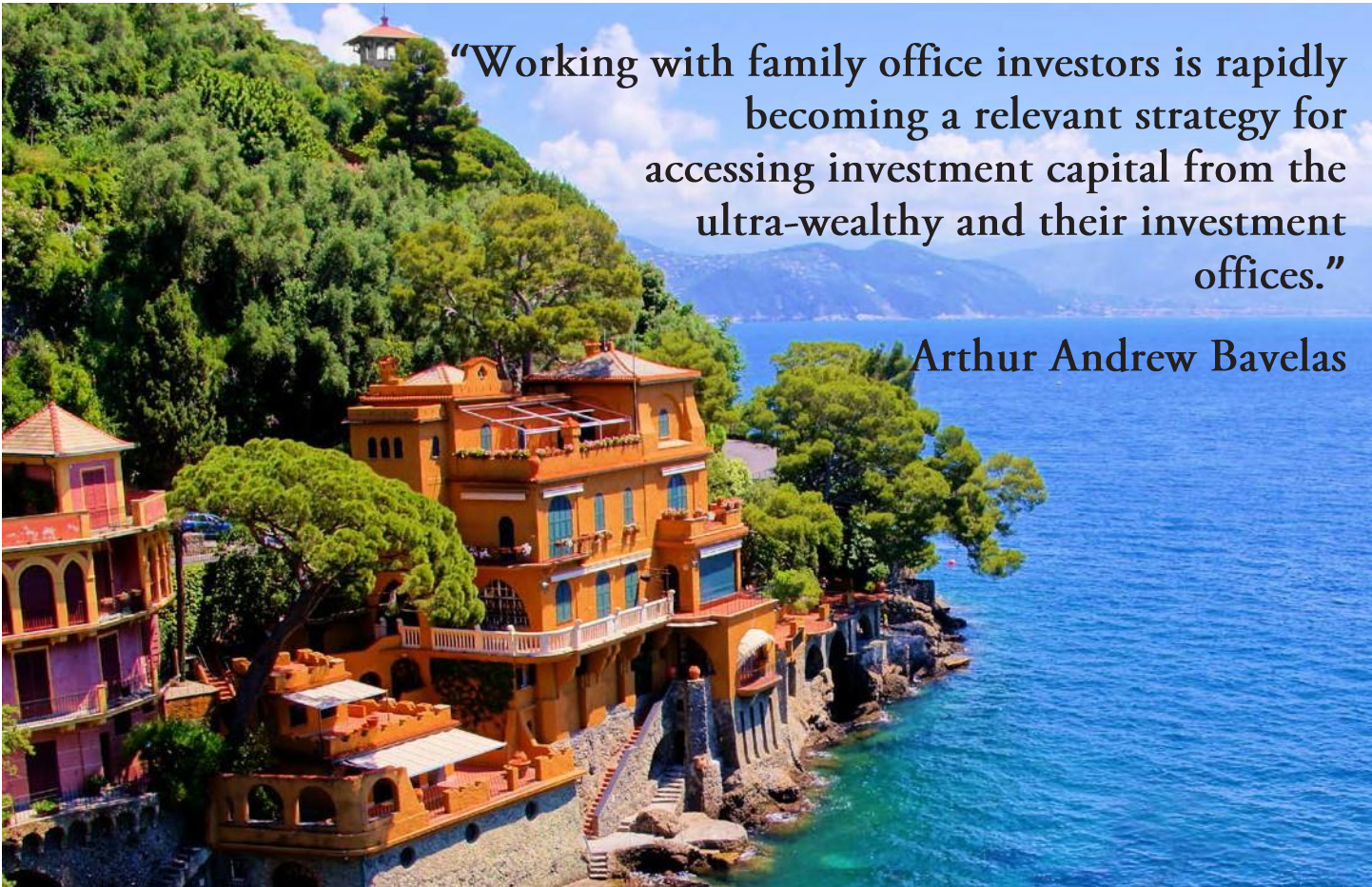
October 20, 2015 – The East Coast Family Office & Wealth Management Conference in New York City at the Union League Club (<http://www.nyc-wealth.com> > nyc-wealth.com).

December 1, 2015- The Florida Wealth Management Conference & Luxury Events just before Art Basel week at The Ritz-Carlton, South Beach (<http://www.wealth-florida.com> > wealth-florida.com).

Q: What can potential attendees look forward to at your upcoming events?

A: We already have exciting speakers like one of Florida's top entrepreneurs Manny Medina who sold his firm for \$1.4 billion USD to Verizon; Tal Kerret from the Silverstein family and head of Silverstein Properties - America's 5th largest developer which is currently rebuilding the World Trade Center; Uri Levine, the multi-millionaire founder of Waze sold to Google for \$1.4 billion; and the lyricist and author of the original HAIR, Jim Rado.





“Working with family office investors is rapidly becoming a relevant strategy for accessing investment capital from the ultra-wealthy and their investment offices.”

Arthur Andrew Bavelas