

DC Finance's Semi-Annual Wealth  
Management Meeting ||  
Nov. 28th 2012



The Tel Aviv Stock Exchange Visitors Center

We are proud to invite you to participate in DC Finance's Semi-Annual Wealth Management Meeting.

Following the success of our Annual Family Office & Wealth Management Conference ([www.israelwealth.com](http://www.israelwealth.com)), we see a strong wish for unbiased and independent information about Wealth Management in Israel.

The Semiannual Meeting will examine in depth the issue that were touched on at the main conference, and will provide a response to the burning issues our HNWI face.

As the scion of a wealthy family, your objectives are to increase and preserve your capital, build a dynasty and enjoy economic security. These objectives have become more complex in these times. Over the past two years, it seems that the world has turned upside down, and in addition to the ordinary challenges of Wealth, family and family business management, we are dealing with shocks on a number of levels:

The world is rapidly sliding into a deep economic crisis with no end in sight; confidence in money managers has been harmed by huge cases of embezzlement and fraud; the Middle East is becoming ever more sensitive; the domestic social protest is liable to change the economy that we have known to date and bring new taxation rules; private banking worldwide is changing in view of pressures to break the walls of confidentiality. These are only some of the changes that will affect our money and how we preserve it.

The wealth management industry in Israel is developing so rapidly that it is unclear whether everyone who claims to be a manager of private money is actually certified and experienced, or whether the investment houses that claim to have Chinese walls between their different areas of operations can actually provide this service at the level required.

Among the speakers:

**Ms. Nava Michael Tsabari**, Director of Family Business Program, Lahav Executive Education, Faculty of Management, Tel Aviv University, **Adv. Avi Abramovitz**, Partner, Rosenberg, Keren-Polak & Co., Advocates, **Mr. Avi Dichter**, Ministry of Home Front Defense, **Mr. Moni Feller**, Business Development Manager, The Phoenix Group, **Adv. Anat Tenne** (CPA), Senior Partner, Dr. Alter & Co. Legal Services, **Mr. Shlomo Maoz**, Chief Economist, Alfa Platinum Investments House, Forum Group, **Mr. Yehudah Barlev**, CPA, Barlev Investigative Auditing, **Mr. Eliav Kamhin**, CIO, Eliahu Capital & Derivatives.