

# THE INNER CIRCLE WEALTH STRATEGIES FORUM

September 20<sup>th</sup> to 22<sup>nd</sup> 2004, Radisson Cable Beach & Golf Resort Nassau, Bahamas

The Inner Circle Wealth Strategies Forum takes place at a time of immense change in private banking and wealth management. Learn first-hand from the experts what strategies are required to meet the challenges of today's financial, legal, and regulatory environments.

*Astute U.S. investors seek protection, preservation and accumulation of wealth through unique opportunities afforded overseas.*

*They wish to create and grow their fortune in an atmosphere of complete AND legal confidentiality.*

*It's all about 21st Century Wealth Management!*



*We invite you to learn how it's done!*

## The Inner Circle Focus

How do I minimize future tax burdens? How do I retain and grow my wealth in a safe and sustainable way? How do I ensure that my heirs benefit from it? How can I achieve this privately and confidentially? Which asset allocation strategy best serves my objectives and needs?

These questions need to be answered. These are the questions we deal with on a daily basis. And these are the questions we will address at The Inner Circle Wealth Strategies Forum.

The strategies introduced at the Forum are geared toward solutions that focus on the following core benefits:

- **Investment Flexibility** – Unrestricted global investment and diversification capability and access to best-of-class asset allocation and management strategies
- **Tax optimization** – deferment or elimination
- **Asset protection** – from creditors, frivolous lawsuits and confiscation of various kinds
- **Privacy** – and legal non-reportability
- **Legal compliance** – in other words “outside the box” solutions that are still within the “box of the code”

## The Inner Circle Privilege

The Inner Circle Wealth Strategies Forum is structured to ensure a **hands-on, interactive learning** experience. It is not about “buy-a-book-and-then-go-home” presentations. The forum offers an exciting two to three days of intense training followed by several days of optional private meetings.

**COMBINE GOOD BUSINESS WITH GREAT PLEASURE!**

# YOUR INNER CIRCLE PROGRAM

**Your host:** The Forum is hosted by BFI Consulting AG, an international financial services company domiciled in Zurich, Switzerland. Frank R. Suess, the President of BFI Consulting, has invited some of the finest minds in the industry of international financial services to present and teach at the Forum.

Through the carefully selected worldwide team of distinguished professionals and experts, you will be introduced to cutting-edge international wealth strategies and investment opportunities that have traditionally been held in reserve for the super-wealthy and are rarely available domestically.

## Keynote Guest Speakers

**Sir John M. Templeton**, a pioneer in both financial investments and spiritual endeavors, has spent a lifetime encouraging open-mindedness and creative thinking. Beginning a Wall Street career in 1937, Templeton created some of the world's largest and most successful international investment funds. Termed "arguably the greatest global stock picker of the century" by Money Magazine (Jan. 1999), he sold his various Templeton funds in 1992 to the Franklin Group for US\$440 million. He was knighted Sir John by Queen Elizabeth II in 1987 for his many accomplishments.

**Prof. Craig D. Hampton**, is widely-known as the architect of "The Hampton Freeze" and other innovative strategies for the world's affluent. A recognized authority in global and United States tax and estate planning matters, he has particular expertise in the design of international life insurance policies and the drafting of offshore life insurance trusts. He is the author of Survivorship Life Insurance (published by Bar Association) and has been retained as an expert witness in this regard.

**Victor Sperandeo**, has had a phenomenal 33-year Wall Street career. He is one of the traders featured in the books "Super Traders" and "New Market Wizards". In 1982 he successfully managed George Soros' Quantum Fund. Mr. Sperandeo has appeared on various TV stations such as FNN, NBC, CNBC, BBC, CBS, etc. His reputation was vastly enhanced when he predicted and capitalized on the stock market debacle of October 1987, which he outlined in an interview with "Barron's".

## Inner Circle Speakers and Topics

**Ken Coleman – How to employ Money Flow Analysis for profitable stock picking.** Ken Coleman is the author of the "Investment Tracker Newsletter", a publication specialized in domestic and global Money Flow Analysis. Mr. Coleman has appeared nationally on radio and television. He recently co-hosted "Invest In America" with Morton Downey Jr. on CNBC TV. In 1987, he was nominated to the Senate select committee on Federal Reserve policy. His publications include books such as "America's Endangered Banks" (1985), "U.S. Financial Institutions In Crisis" (1984) or "A Monetary Time Bomb Is Ticking, Ticking, Ticking..." (1991, revised printing 1999).

**Jim Francis – Offshore real estate investments opportunities.** Jim Francis is an internationally renowned business development and personal wealth expert. He is also an accomplished speaker, who has shared the stage with Tony Robbins, Og Mandingo, Ken Blanchard, Brian Tracy, Zig Ziglar, Russ Whitney and more. Mr. Francis has developed businesses in several countries, including the UK, Ireland, Canada, Spain and the USA. Through his M2 Services, he helps companies and individuals increase revenue, and decrease expenses, often through effective international tax strategies.

**Jon Golding – Caribbean Private Banking Focus – The Tips and Traps after the USA Patriot Act and Sarbanes-Oxley.** Mr. Jon Golding runs the private wealth management division of the RBTT Financial Group, the largest financial services group in the Caribbean and Central America. Prior to that he was CEO of Sterling Westminster Group in London, England, a private wealth management group, for over 20 years. He previously worked for a private banking group in Doha, Qatar, held by members of the Qatari ruling family. Mr. Golding has been a regular speaker for over 20 years at international investment seminars in the US and Europe. He authored the book, "The Tips & Traps of Going Global" (Scope, London) and was the international markets columnist for "Financial Planning" (Warren Gorham Lamont, New York) for 8 years. His focus is on the combined challenges of private wealth preservation, asset management and family asset protection in an increasingly uncertain world.

**Dr. Christopher Grande, M.D., M.P.H. – Street Level Asset Management (SLAM).** Dr. Christopher M. Grande, is an internationally renowned physician, who has published, lectured and consulted extensively in his area of expertise, trauma care. He is the Executive Director of TraumaCare International, a non-profit scientific foundation, and has been appointed as a full professor at several prestigious university medical schools during the course of his career. With a background in finance and management, as well as service in the armed forces, he has had a wide range of business experiences around the world. Dr. Grande has been invited to the Forum to share his experiences in the world of personal finance and global investments, and to offer advice that is applicable not only to physicians but also to other individuals who derive the bulk of their income by providing professional services.

**L. Wayne Harber – How to achieve attractive, risk-adjusted returns in private equity.** Having initiated over \$26 billion of private equity investments, Hamilton Lane is a recognized leader in global private equity investment services and information. Wayne Harber is the Managing Director of Hamilton Lane International. He heads up their global marketing efforts including the firm's non-US expansion and product development. Mr. Harber's responsibilities include structuring fund-of-fund vehicles, execution of fund-raising and investor relation activities in conjunction with the firm's international portfolio managers.

**Dr. Mario Praschil – State-of-the-art wealth controlling and risk management techniques.** Dr. Mario Praschil is an internationally recognized expert in the field of global wealth management and asset allocation. He is the Managing Director & Founder of CFO strategy & controlling services (CFO), a Liechtenstein-based corporation that provides independent strategy consulting, asset allocation and controlling services for wealthy families, high net-worth individuals, trustees, pension funds and family offices. Mr. Praschil holds an MBA and a Ph.D. in Business Administration from the University of Innsbruck, Austria.

**Dr. Markus Ruffner – Capital and yield guaranteed investment strategies.** Markus Ruffner is a co-founder of New Private Bank Ltd. (NPB), a Zurich based private bank. NPB's primary focus lies in the area of asset management for International high net worth individuals as well as for Swiss institutional investors. Dr. Ruffner is the financial engineer for a wide range of structured products (related to fixed income, commodities, equity, hedge funds) offered by NPB. He is also an assistant professor at the renowned University of St. Gallen, the number one business school in Switzerland.

**Frank R. Suess, MBA – Opportunities of International Life Insurance Planning.** Mr. Suess is the President of BFI Consulting AG, a Zurich-based international financial services company. BFI Consulting advises affluent and high net-worth individuals on implementing international, tailor-made structures and investment solutions that combine the advantages of asset protection, privacy, tax optimization and global investment flexibility. BFI's primary focus lies in the area of insurance-based wealth preservation strategies for international investors.

**Peter Zipper – Private Banking in Austria.** Mr. Zipper is the head of Anglo Irish Bank (Austria) AG, International Marketing Department. Mr. Zipper is a true marketing professional, well established in the industry and introducing the world of Austrian Private Banking to international investors around the globe. After joining Anglo Irish Bank, he lived and worked in Canada for seventeen years where he held senior positions in the financial industry.

And more...

### The Forum Schedule

#### Sunday, September 19, 2004 – Arrivals

#### Monday, September 20, 2004 – Big Picture Day

08:30 – 12:00 Inner Circle presentations  
 12:00 – 14:00 Lunch & Leisure  
 14:00 – 15:00 Keynote Guest Speaker  
 15:15 – 18:00 Workshops  
 18:00 – 19:30 Dinner & Leisure  
 19:30 – 21:00 Cocktail at the Pool

#### Tuesday, September 21, 2004 – Strategy & Structure Day

08:30 – 12:00 Inner Circle presentations  
 12:00 – 14:00 Lunch & Leisure  
 14:00 – 15:00 Keynote Guest Speaker  
 15:15 – 18:00 Workshops  
 18:00 – open Dinner & Leisure

#### Wednesday, September 22, 2004 – Investments Day

08:30 – 12:00 Inner Circle presentations  
 12:00 – 14:00 Lunch & Leisure  
 14:00 – 15:00 Keynote Guest Speaker  
 15:15 – 18:00 Workshops  
 18:00 – 19:00 Leisure  
 19:00 – 22:00 Closing Event & Dinner

#### Thursday, September 23, 2004 – Departures

## The Radisson Cable Beach & Golf Resort, Nassau, Bahamas

Situated on one of the finest white-sand beaches in the Caribbean, the Radisson has earned its reputation as a premier vacation experience. With flexible indoor and outdoor space and an award-winning conference staff, the resort is an unparalleled venue for meetings such as ours.

The spacious and well-appointed accommodations feature over-sized private balconies with spectacular views of the Hotel's seven-acre waterscape, lush tropical gardens, or the breathtaking teal ocean.

We are certain that the Radisson will add to the value and positive experience our meeting in Nassau will give you.



## Your ALL-in Package

Attendance at the Forum is offered at sensational **ALL-INCLUSIVE** rates that cover all costs of the investment conference as well as the hotel accommodations at the Radisson Cable Beach & Golf Resort for four nights, from September 19<sup>th</sup> to September 23<sup>rd</sup>, 2004.

**Standard rates:**

**US\$1,280.- per person/US\$1,780.- per couple**

## Additional Nights at the Radisson

Registered attendees and their partners that feel like staying longer – either before or after the seminar – for private consultations, or simply to enjoy the outdoor beauty and pleasant climate of the Bahamas, can do so at the following ALL-IN rates!

**US\$163.- per person – single occupancy**

**US\$125.- per person – double occupancy**

## Why you should be there!

- ... gain access to top global investments, generally reserved to institutions and the super-wealthy only.
- ... significantly improve the returns of your portfolio by employing state-of-the art investment techniques and cutting-edge tax planning.
- ... hear of the latest trends in international banking wealth management and privacy.
- ... protect your assets from a litigious society in an era of citizen transparency.
- ... become part of the **INNER CIRCLE**, an exclusive network of international investors and leading financial services experts.
- ... arrange for personal consultations with Inner Circle experts and keynote speakers to help you manage your wealth more effectively and efficiently.
- ... take advantage of the rare opportunity to personally meet Sir John Templeton.
- ... simply combine good business with the leisurely joys of the gorgeous Bahamas, and spend a memorable time with your friends and family.

Don't miss this unique event!

**Register Now!**

**\$300 off until August 15th**

**US\$980.- per person** instead of \$1,280

**US\$1,430.- per couple** instead of \$1,780

These rates are All-Inclusive -- meals, hotel accommodations and conference fees covered.

To order a registration kit, call

**1-800-331-0996**

Or visit our website at

**[www.bfi-consulting.com](http://www.bfi-consulting.com)**

**Money-back Satisfaction Guarantee**