

With a focus on the role of women in family offices, we will explore key themes through both presentations and panel discussions, combining insights from experienced thought-leaders with real-world perspectives from family offices as well as family office peers.

## KEY THEMES

- **Challenging the Stereotype** – together we explore how unspoken expectations shape women's roles, while developing communication tools that build trust and convey leadership and strategic intent with clarity and confidence.
- **Preparing the next or rising generation, why timing is everything** – best in class lessons re: next generation transfer. “When” is the biggest question. What age-appropriate discussions should happen?
- **Horizontal Transfer** – how women are rewriting the Legacy of Wealth and lessons we can learn from the likes of MacKenzie Scott and others.

## WHY ATTEND

- Support for women whose interests extend beyond managing a family foundation, but who may feel unsure about speaking up or challenging established norms.
- We explore best-in-class guidance on next-generation transfer, addressing questions such as; When is the right time? How early is too early? and How to approach age-appropriate conversations.
- We also cover horizontal transfers, which often happen unexpectedly, exploring how to navigate them, the resources and support to have in place, and strategies to prepare for to reduce potential risks.

## EVENT DETAILS

**Date:** Tuesday, 17 March 2026

**Venue:** Gate 8, Jolimont House, 86-88 Jolimont Street,  
East Melbourne, VIC 3002

**Time:** 09:45am

A two course lunch with wine will be served to all attendees after the conclusion of the event to allow for further peer to peer discussion and as well as with the presenters.



**EMMANUELLA GRACE**

Emmanuella is a professional speaker, accomplished singer and consultant who assists individuals and cohorts develop confident, authentic voices for high-stakes environments, including with family offices. Specialising in leadership, highly technical professionals, and multigenerational teams, her work integrates formal training in psychology, teaching, and music. Through a deep understanding of the connection between voice, body, and self, she guides people to communicate with clarity, conviction, and presence. Emmanuella has appeared on legendary stages including the Royal Albert Hall, the Barbican, and the Sydney Opera House, and has performed with broadcasters such as the ABC (Australia) and the BBC (UK).

## AGENDA

9:45am – Welcome

10:00am – Commencement

12:00pm – Conclusion, to be followed by lunch



**DAVID WERDIGER**

David helps family enterprises navigate intergenerational transitions and make good decisions together. His diverse background gives him a powerful mix of skills and he brings all parts of himself together in unique and innovative ways. In his third career as a family enterprise advisor, David is a best-selling author on wealth transition, an experienced non-executive director, second generation family member and family office principal, and a dynamic speaker and educator. He was previously a software geek and a tech entrepreneur.

## COST

Complimentary entry for Global Legacy Partner members.  
\$250 + GST for non-Global Legacy Partner members.

**RSVP**

KINDLY RSVP YES OR NO TO  
CONFIRM YOUR ATTENDANCE.

**RICHARD CHOLEWICK**

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