

INFLUENCE

19 - 22 May 2024

The Loren Hotel, Bermuda



<https://veritage.ca/retreats/>





Retreat Overview

Overview

Set against the beautiful backdrop of Bermuda's iconic pink-hued sand and turquoise waters, INFLUENCE brings together a carefully curated group of family businesses and thought leaders, for three days of connecting, storytelling, workshops and education.

Led by one of the world's most sought-after family business advisors and coaches, INFLUENCE is the first event of its kind, to focus on the human capital as the foundation for a healthy and sustainable family business.

To enable a Safe Space™ attendance to the retreat is limited to an intimate gathering of 20-28 global UNHWIs representing their family businesses. Through a custom curated program designed to deepen familial relationships, guests will have the opportunity to develop a family governance model, that ensures the legacy of the business, and its members for generations to come.

What to Expect

With a focus on learning who and what are your greatest influencers, guests will be invited on a journey of discovery. Using our unique process of Organized Emotional Governance, we will provide you with the tools to identify your personal story, leaving you with a deeper understanding of your purpose and a clear roadmap to communicate and work together effectively.



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The Story

The world we live in is becoming increasingly complex – global conflicts, rising prices and pandemics are rewriting the economic landscape for us all. Despite this fluid backdrop, the number of billionaires and wealthy families continues to rise - the latest Forbes 2023 list saw the number reach 2,640, spanning 77 countries or territories around the globe - up from 75 last year. This increase is reflective of the rise in family offices being set up to manage their wealth.

But just as with any family structure, family offices are also vulnerable to the potential disruptive and corrosive dynamics that exist in almost every family. Sibling rivalries, insecurities and deteriorating relationships, are familiar sources of disharmony that can lead to the destruction of the family and the business.

The Problem

There is currently a gap within the family office space. Whilst there are numerous events and conferences focusing on investment, structures and taxes, there is something missing - the human heartbeat that's intrinsic to every family business.

Based on Francesco's personal experience of attending countless family conferences for the past twenty years, what families really want is to talk about the tough stuff - the family relationships and dynamics that bubble away in the periphery.

Families need a guide to help them explore their truth and authentic self, and a 'safe space' to explore the emotional and psychological wellbeing of the family, which is often neglected.



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The Solution

A bespoke, intimate and highly curated 'retreat' that focuses on the human dynamics within a family-owned business. A 'retreat' and not a conference.

Families need a quiet secluded place to rest, reconnect and realign their individual stories and purpose. We believe less is more, which is why we carefully curate the agenda, speakers and hosts to establish a seamless narrative, message and story that is clearly defined.

By creating the 'safe space' individuals and families can explore and work together without the distractions of the daily operations. They can collaborate, listen and learn the tools to help them grow together and not apart.

We create an environment where everyone's voice is heard. Guests discover why they do what they do, how their behaviours affect the family and the business, and how to do things differently.

The Opportunity

Veritage is a renowned international family office advisory firm focusing on the emotional governance of money and wealth. Led by its founder and CEO Francesco Lombardo, Veritage is a unique voice in the family office space.

Whilst there is an abundance of 'family office networking events', there is an absence of those prioritising the emotional and psychological wellbeing of the business and its members.

INFLUENCE will change this by offering a safe, honest, and transformative experience for families to grow from the inside out.

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