

Portfolio Management for Family Offices: The Endowment Approach

Speaker: Shinya Deguchi, Founder of Star Magnolia Capital

Tuesday, 12 October 2021

13:00 UKT / 20:00 HKT

07:00 Cayman Islands / 08:00 New York

12:00 Iceland / 13:00 Ireland, Portugal / 14:00 Luxembourg

15:00 Russia / 17:30 India / 20:00 Singapore, Malaysia

21:00 Tokyo, Korea / 22:00 Sydney

(This session will last for an hour)

Shinya Deguchi is the Founder of Star Magnolia Capital, a Shanghai-based multi-family office. In his two decades of experience in asset allocation, manager due diligence, fraud detection, global macro analysis and family office management, he has reviewed and conducted due diligence on more than 2,000 asset managers.

The Endowment Approach to investing aims to preserve the purchasing power of a portfolio in perpetuity, so that it can continue to provide for the institution it supports for as long as the institution exists. The Yale University endowment's CIO David Swendsen is frequently credited with developing and implementing this style. In this webinar, Shinya will explain the similarities between the needs of a university endowment and the needs of a multi-generational family, and will drill down into the manager selection and asset allocation implications.

Shinya's presentation in this live session forms Lecture 3 of the Portfolio Management Module of the Henley Family Office Program.

This session will be run on Zoom.

Please reserve your spot through your [IPI Career Network](#) membership, or email lisa.so@ipi-edu.com.

This session qualifies for CPT