

# Training for children that will inherit assets that worth more than US\$20 million

An adventure into the world of hedge funds and money management, for the children of Very High Net Worth Individuals

Participants will range in age from 12 to 19

Hedge Funds, Alternative Investments, Money Management, Risk Management.

You definitely understand this environment. You have created wealth, you have become a very high net worth individual. You have net financial assets of at least US\$20 million excluding your primary residence and consumables. You definitely like hedge funds and alternative investments.



You know how difficult it is to make money, and how easy it is to lose whatever you have. And, you worry about the people you love, your children. An unprecedented amount of wealth will be passed on to a new generation. You spend a lot of time and energy managing your money, and even if you have the time and energy to educate your children yourself, it is very difficult. You have understood that it is almost impossible for parents to educate their own children.

There are some classes around the world for the children of the very high net worth individuals. Some of these classes are good, but there are at least 3 important problems:

- A. No confidentiality. You may become a case study.
- B. The class is for the "average child of the high net worth individuals". Not for your child. You have no way to influence the content of the course. Your family values may be very different from the values of the other families and the instructors.
- C. You have to send your child somewhere for this class, and you don't like this idea.

We have a different approach: We believe in One-on-One Training. We know that you are unique, your values are unique, your portfolio and investments are unique, your children are unique. Customized,

individualized, and hands-on, one-on-one training is ideal for your children. You will choose the modules that are suitable for them.



We will sign a confidentiality agreement and nobody will learn from us something about your business or your family. You will neither become a case study nor a report.

George Lekatis is the general manager of Compliance LLC, a leading provider of risk and compliance training and consulting in 36 countries. George will be responsible for this program. He has an exceptional record and a unique ability to explain difficult things in a way that is interesting and funny. He will undertake only 3 children, that will inherit assets from their families that worth more than US\$100 million.

George is Mathematician, IT and Risk expert, hedge funds consultant, and holds numerous certifications. He is known for his regulatory arbitrage strategy (using Basel ii and the 8th Company Law Directive of the EU for arbitrage). He is an internationally acclaimed trainer and consultant, and has more than 17,000 hours of teaching experience, leading classes from the States to the Cayman Islands, to Bermuda, to London, to Dubai, to Singapore. He has demonstrated exceptional presentation and communication skills.



We have only 3 other trainers and consultants that have the knowledge and experience to work with children having the needs described above. We will not work for families that have the intention to inherit assets that worth less than US\$20 million.

## What we offer

1. One-on-One Initial Training, 4 days at your home or a venue of your choice around the world.
2. Challenges for Young Investors. 25 challenges per year
3. Two days training after 6 months

Participants will range in age from 12 to 19

## More details

1. One-on-One Initial Training, 4 days at your home or a venue of your choice around the world.



### Step 1: Designing the Course

- Confidentiality Agreement
- Assessment of family needs
- Assessment of individual needs
- Learning objectives: We will discuss with the family and determine what is needed
- Person analysis. An assessment of the child. Strengths and weaknesses.
- The family's values and legacy
- Some modules
- Learning about business and entrepreneurship
- Leadership and decision making
- Managing Money
- Managing People
- Investments: Risks and Opportunities
- Investment principles and strategies
- From Mutual Funds to Hedge Funds
- The Risks in every Opportunity
- The Compliance with Laws and Regulations
- Principles for long-lasting family wealth
- How to communicate effectively
- Understanding motivation
- Principles of effective negotiation
- Credit and debt management. The risks
- The importance of cash flow
- Wealth comes with responsibilities
- Today's financially sophisticated world
- Analysis of stocks using Internet tools
- Goal setting
- Working with advisors, lawyers, accountants and professionals from your family office
- Owning property around the world

## Step 2: Delivering the Course

4 days One-on-One Training at your home or a venue of your choice around the world.

We will do our best to make the course funny, interesting and challenging.



We will use:

- Case studies
- Simulations
- Role-playing

## Step 3: Evaluating the Course

Evaluation from the instructor.

Presentation to the family: The strengths and the weaknesses of the student. What is recommended.

## 2. Challenges for Young Investors

25 challenges per year

We will be in touch with our students **every two weeks**

We will discuss hedge fund **strategies, risks and opportunities**. We will **learn to investigate, to use fundamentals and technical analysis, and make decisions**.

Each student will choose stocks and securities, building a virtual portfolio. He/she will take advantage of products like **spread betting and contracts for differences**.

We will discuss current opportunities from the **London Stock Exchange**. We will evaluate our decisions every two weeks and we will **learn from our mistakes**.

We will also learn how hedge fund managers **sell short and use leverage**, in order to exploit opportunities. We will **analyze the risks involved**.

We will make investments interesting, funny, challenging. We will start from what young people like - to win - and we will travel with them through a magic virtual world full of risks and opportunities.



### 3. Two days training after 6 months

We will travel to meet our students for two days. We will discuss about the differences in the global financial environment after 6 months, the new risks and the new opportunities.

Our main learning objective:

- To explain to the students that "losers in every opportunity see a problem, winners in every problem see an opportunity".
- The need to be flexible.
- The need to have written goals.
- The need to learn, evaluate, make informed decisions.

### The cost

The cost for the first year is US\$ 45,000 per student.

Everything is included in this price: Travel to your venue anywhere in the world, expenses, tax etc.

We will design, deliver and evaluate the 2 courses (4 and 2 days).

We will design, deliver and evaluate the 25 challenges.

We will keep in touch with your children every 15 days with new challenges.

The cost for the second year is US\$ 40,000 per student.

We will design, deliver and evaluate 2 more courses (4 and 2 days).

We will design, deliver and evaluate 25 more challenges.

We will tailor our training to the needs of the children, and we will use the experience of the previous year to have even more success.

What if you have 2 or more children from the same family? Can we have a small class for these children?

No. We will design a different course for each student.

Every child is unique, and has unique needs and character.

For more children from the same family, we will insist on our core principle: One-on-One Training

For the second, third etc. child from the same family, you will have 20% discount.

## Contact Us

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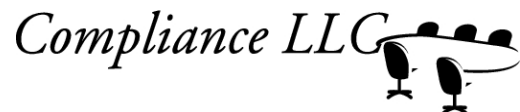
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## About Compliance LLC (the owner of the Hedge Funds Club)

Compliance LLC is a leading provider of risk and compliance training, executive coaching and consulting in

36 countries

(www.compliance-llc.com).



### Compliance LLC, Areas of expertise:

- Training and consulting for Hedge Funds, Alternative Investments and Structured Products
- Hedge Funds Strategies
- The Basel ii Capital Accord

- The European Sarbanes Oxley (8th Company Law Directive, E-SOX)
- The Japanese Sarbanes Oxley (Financial Instruments and Exchange Law)
- The European Union's Financial Services Action Plan (FSAP)
- The Solvency ii and Reinsurance Directives of the EU.

Clients and Testimonials

<http://www.compliance-llc.com/ClientsTestimonials.htm>

Our (108 pages) training catalog:

[http://www.compliance-llc.com/1\\_Compliance\\_Training\\_Catalog.pdf](http://www.compliance-llc.com/1_Compliance_Training_Catalog.pdf)



# Hedge Funds Club

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[www.hedge-funds-club.com](http://www.hedge-funds-club.com)