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INTERNATIONAL EVENTS GROUP

# PRIVATE BANKING & WEALTH MANAGEMENT SWITZERLAND CONFERENCE AND AWARDS 2023

## Zurich Marriott Hotel

## 14th December 2023

**2023 Speakers:**

Chair: Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC
Chair: Caroline Babayéguidian, Director – Sustainability, Group Compliance, Regulatory & Governance, UBS
Yiping Li, Chief Operating Officer, Private Bank Central Europe & US, Deutsche Bank
Dr. Burkhard P. Varnholt, Head of Investments at Credit Suisse, a UBS Group Company
Dr. Reto Cueni, Chief Economist, Vontobel
Jeff-Richard Angehrn, Chief Financial Officer, Raiffeisenbank Zurich and Klarpay AG
Dr. Stefan Gerlach, Chief Economist, EFG Private Bank
Dr. Francesco Mandalà, Chief Investment Officer, MBaer Merchant Bank
Rosa Sangiorgio, Head of Responsible Investing, Pictet Group
Stefan Kirsch, Head of International Private Banking, Managing Director, Bergos Bank
Nayana Talwar, Head Private Clients & Family Offices, Sygnum Bank
Sarah Gadd, Chief Data Officer and Head of Data & Process Engineering, Julius Baer
Stefan Edelmann, Head Asset Management Business Development, Sygnum
Alina Aroni, Senior Vice President, Lombard Odier
Antonio Sundas, Digital Asset Specialist, BBVA
Jon Duncan, Chief Impact Officer, REYL Intesa Sanpaolo
Melanie Peterson, TrainAI Centre of Excellence Lead & Program Director, RWS
Aurélie Maillard, Head of Private Markets, Société Générale Private Banking (Suisse) SA
Michele Torti, EMEA Sales Director, LeapXpert
Alexander Stumpfegger, Chief Sales Officer, CID
Thierry Chatenet, Senior Sales Executive, Wealth Dynamix
Michael Welti, Managing Partner and Head of Private Banking, Banque Heritage
Tamara Kostova, CEO, Velexa
Stéphane Gomis, Deputy CEO, Azqore
Christine Ciriani, Chief Revenue Officer International & GM APAC, Invest Cloud
Dr. Michael Schlattau, Head of Business Consulting, Finfox
Boris Rankov, Head of Product and Strategy (EMEA and APAC), Invest Cloud
Martin de Heus, EMEA Director, Moxo
Kai Lenz, Head of Financial Services Industry EMEA, Service Now

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# PRIVATE BANKING & WEALTH MANAGEMENT SWITZERLAND CONFERENCE AND AWARDS 2023

## 14th December 2023 | Zurich Marriott Hotel

08:00 **Registration**

08.50 **Welcome address and chair's opening remarks**
**Ian Woodhouse, Former Lead Wealth Management Business Model Transformation and Thought Leader for Europe, Accenture Wealth and Asset Management**

**SESSION ONE | The Future Outlook of Private Banking**

**Chair: Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC**

09:00 **Conquering the Crossroads of Swiss Private Banking**

- Development of the Swiss Private Banking market in the global context, consolidation and new entrants (Fintech companies).
- Highlight trends impacting Swiss private banks; regulatory trends, tech innovation and artificial intelligence, next generation, ESG requirements.
- Strategies to prepare for upcoming developments.

**Stefan Kirsch, Head of International Private Banking, Managing Director, Bergos Bank**

09:20 **Streamlining Client Business Interactions in Wealth**

- Rethink today's costly, inefficient, and fragmented client interaction model requiring significant manual intervention.
- Create client interaction workspaces and seamlessly blend contextual unstructured client interactions with structured business actions in one stop.
- Provide a private, personalized, and modern client experience and increase retention
- Use actionable business insights to improve team productivity, identify bottlenecks, and drive efficiency.
- Maintain account control with a complete audit trail and seamless transfer of account interactions across staff.

**Martin de Heus, EMEA Director, Moxo**

09:40 **Future proofing Swiss Private Banks: Digital Innovation, Sustainability and Clients' Expectations**

- Highlight trends in clients' requirements across generations.
- Explore the intersection of digital innovation and sustainability for clients' engagement.

**Rosa Sangiorgio, Head of Responsible Investing, Pictet Group**

10:00 **Training Finance AI Models: AI Data Best Practices & Pitfalls**

- Discuss the impact of training data on AI model success.
- Provide real-world examples of the consequences of using the wrong data to train AI.

- Present practical AI training data strategies to mitigate bias, support explainability, ensure transparency while maintaining privacy and security, and more.

**Melanie Peterson, TrainAI Centre of Excellence Lead & Program Director, RWS**

10:20 **Green Economy Transition – Implications for Wealth Portfolios**

- Defining and Dimensioning the Green Economy.
- Risk and opportunities of the Transition.
- Public versus Private markets.
- Implications for Wealth Portfolio's.

**Jon Duncan, Chief Impact Officer, REYL Intesa Sanpaolo**

10:40 **Panel Discussion | Looking to 2024: What does Switzerland have to offer?**

**Chair: Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC**
**Rosa Sangiorgio, Head of Responsible Investing, Pictet Group**
**Stefan Kirsch, Head of International Private Banking, Managing Director, Bergos Bank**
**Jon Duncan, Chief Impact Officer, REYL Intesa Sanpaolo**
**Martin de Heus, EMEA Director, Moxo**
**Kai Lenz, Head of Financial Services Industry EMEA, Service Now**

11:00 **Morning Refreshment Break**

## SESSION TWO

### Stream A | Digital Transformation and Innovation

*Chaired by*
*Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC*

11:30 **Building a Future-State Ethical Data & AI Framework**

- With the explosion of Generative AI the focus on what to trust has exponentially increased, this applies all products and services, including Data.
- Need for Data and AI frameworks to be code to support scalability.
- What Data as a Product looks like and steps to get there?
- Data awareness and literacy for the whole organisation (and the whole world.

### Stream B | Client-centric growth

*Chaired by*
*Caroline Babayéguidian, Director – Sustainability, Group Compliance, Regulatory & Governance, UBS*

11:30 **The Rise of Entrepreneurs as your Next Generation of Clients**

- Explore the expectations and values of Next Gen Entrepreneurs.
- Learn how developing communication and sustainability strategies can boost Next Gen Entrepreneur's acquisition and engagement.
- Engage in a case study on how London RM's are engaging Next Gen Entrepreneurs.

**Alina Aroni, Senior Vice President, Lombard Odier**

**Sarah Gadd, Chief Data Officer and Head of Data & Process Engineering, Julius Baer**

11:50 **How to use Machine Learning and Generative AI to drive research-driven and personalized investment recommendations at scale**

- Data, AI and the Cambrian Explosion.
- From House View to Recommended for You – How AI can help.
- How to embed AI in a highly regulated environment like investing?

**Boris Rankov, Head of Product and Strategy (EMEA and APAC), Invest Cloud**

12:10 **Boosting Productivity and Profits: How Technology can Elevate Efficient Growth**

- How we can utilise technology to boost workplace efficiency.
- Discover how we can use technological efficiency; what can we learn?
- How does technology benefit your efficiency, but also maximise client interaction.

**Jeff-Richard Angehrn, Chief Financial Officer, Raiffeisenbank Zurich and Klarpay AG**

12:30 **AI in Wealth Management: A New Era of Opportunity**

- Leverage AI to drive automation and efficiency.
- Unlock value from a state-of-the-art software architecture and data stack.
- Use case: Win more business from mass affluent and (U)HNW individuals.

**Alexander Stumpfegger, Chief Sales Officer, CID**

11:50 **Beyond Regulation: Crafting a Customized ESG Investment Experience**

- ESG landscape, perceived tendencies and market practices.
- Core-satellite investing in the context of ESG.
- Facilitating ESG implementation: from regulatory compliance to a client-centric value-add offering.

**Dr. Michael Schlattau, Head of Business Consulting, Finfox**

12:10 **Factor Investing - The Key to Differentiation and Growth in a Competitive Market**

- Navigate the competitive investment landscape, and find key trends that could engage your clients.
- Learn what factor investing is, and how a client centric mindset can strengthen relationships and growth.
- How MBaer Merchant Bank combines macroeconomic views, factor investing and clients' risk preferences.

**Dr. Francesco Mandalà,Chief Investment Officer, MBaer Merchant Bank**

12:30 **Reach your clients where they are: Responsible Business Communications on mobile messaging**

- Gain a competitive advantage by enabling compliant communications on messaging apps, such as WhatsApp, iMessage, SMS, WeChat and others.
- Implement compliant mobile messaging policies through the native messaging application or an enterprise-grade application, also available through Microsoft Teams.
- Meet not only local and global recordkeeping but also security requirements, while unlocking new business opportunities and potential.

**Michele Torti, EMEA Sales Director, LeapXpert**

12:50 **Panel Discussion | Digital Disruption or Digital Delight? Looking towards the digitalisation of Private Banking**

**Chair: Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC**
**Sarah Gadd, Chief Data Officer and Head of Data & Process Engineering, Julius Baer**
**Yiping Li, Chief Operating Officer, Private Bank Central Europe & US, Deutsche Bank**
**Jeff-Richard Angehrn, Chief Financial Officer, Raiffeisenbank Zurich and Klarpay AG**
**Thierry Chatenet, Senior Sales Executive, Wealth Dynamix**
**Alexander Stumpfegger, Chief Sales Officer, CID**
**Christine Ciriani, Chief Revenue Officer International & GM APAC, Invest Cloud**

12:50 **Panel Discussion | Fuelling growth through client focus; what do clients want from their banks? Sustainable action, personalisation, or new market opportunities?**

**Chair: Caroline Babayéguidian, Director – Sustainability, Group Compliance, Regulatory & Governance, UBS**
**Alina Aroni, Senior Vice President, Lombard Odier**
**Dr. Francesco Mandalà, Chief Investment Officer, MBaer Merchant Bank**
**Dr. Michael Schlattau, Head of Business Consulting, Finfox**
**Michele Torti, EMEA Sales Director, LeapXpert**

13:10 **Lunch and Networking**

## SESSION THREE

### STREAM A | The Question of Growth

*Chaired by*
*Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC*

14:10 **Partners for tomorrow's Wealth Managers, Azqore is supporting the quest for growth through:**

- An integrated IT platform for wealth managers.
- The promotion of cross selling opportunities between its clients.
- The use of cutting edge technology like GenAI.

**Stéphane Gomis, Deputy CEO, Azqore**

14:30 **How can Private banks attract new customer segments - GenZ, their expectations, and requirements**

### STREAM B | Innovative Solutions: Changes in Investments and Asset Class

*Chaired by*
*Caroline Babayéguidian, Director – Sustainability, Group Compliance, Regulatory & Governance, UBS*

14:10 **Geopolitics, Resources, and Globalization: Impacts on Investors**

- Understand how these developments influence portfolios.
- Develop strategic recommendations for Investors.

**Dr. Reto Cueni, Chief Economist, Vontobel**

14:30 **'Monetary policy is tightening': A Swiss perspective**

- The SNB and the outlook for monetary policy in Switzerland.

- Why Swiss Private banks should consider extending their audience focus to emerging retail investor segments?
- How is financial landscape being changed by unique financial needs and values of NextGen consumers.
- What long-term potential stems from GenZ - the first digitally native generation of investors.
- Why is brand loyalty important to ensure a competitive edge of Private banks.

**Tamara Kostova, CEO, Velexa**

- The macroeconomic backdrop and asset markets: inflation and the threat of recession.
- A longer term view: public debts, interest rates and fiscal policy.

**Dr. Stefan Gerlach, Chief Economist, EFG Private Bank**

14:50 **Crypto Ecosystem Update by Sygnum Bank**

- Introduction of Sygnum Bank.
- Crypto ecosystem, key growth drivers and opportunities for investors.
- Institutional adoption of crypto assets by independent asset managers and banks.

**Nayana Talwar, Head Private Clients & Family Offices, Sygnum Bank**
**Stefan Edelmann, Head Asset Management Business Development, Sygnum Bank**

14:50 Panel Discussion | **Sustainability, Central Banks and Geopolitics**

**Chair: Caroline Babayéguidian, Director – Sustainability, Group Compliance, Regulatory & Governance, UBS**
**Dr. Reto Cueni, Chief Economist, Vontobel**
**Dr. Stefan Gerlach, Chief Economist, EFG Private Bank**
**Aurélie Maillard, Head of Private Markets, Société Générale Private Banking (Suisse) SA**

15:10 **Banks for digital assets mass adoption, BBVA use case**

- Traditional assets and digital assets, the two worlds together.
- BBVA Digital Assets Platform.
- BBVA vision.
- The technology upheaval must continue.

**Antonio Sundas, Digital Asset Specialist, BBVA**

15:30 Panel Discussion | **Emerging Opportunities in Private Banking: Is growth needed?**

**Chair: Ian Woodhouse, Former Lead Wealth Management Business Model Transformation and Thought Leader for Europe, Accenture Wealth and Asset Management**
**Nayana Talwar, Head Private Clients & Family Offices, Sygnum Bank**
**Antonio Sundas, Digital Asset Specialist, BBVA**
**Tamara Kostova, CEO, Velexa**
**Stéphane Gomis, Deputy CEO, Azqore**

15:50 **Afternoon Refreshment Break**

**SESSION FOUR | Preparing for disruption in the financial landscape**

*Chaired by*

*Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC*

16:10 **Prepare, don't predict: what could shape global markets in 2024?**

- How private clients can successfully navigate in a rapidly changing world order.
- What's driving the world economy, geopolitics, the energy transition, AI, inflation and monetary policy.

**Dr. Burkhard P. Varnholt, Head of Investments at Credit Suisse, a UBS Group Company**

16:30 **How to define "growth" for Wealth Management in 2024 – the shift in client approach**

**Michael Welti, Head of Private Banking, Banque Heritage**

16:50 **Panel Discussion | Preparing for disruptive forces; ways to navigate periods of uncertainty**
**Chair: Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC**
**Dr. Burkhard P. Varnholt, Head of Investments at Credit Suisse, a UBS Group Company**
**Michael Welti, Head of Private Banking, Banque Heritage**

17:20 **Close of Conference**

18:30 **Drinks Reception**

19:30 **Private Banking & Wealth Management Switzerland 2023 Awards Ceremony**