



# PRIVATE BANKING & WEALTH MANAGEMENT SWITZERLAND CONFERENCE AND AWARDS 2023

Zurich Marriott Hotel

14<sup>th</sup> December 2023

## 2023 Speakers:

Yiping Li, International Private Bank EMEA, Chief Operating Officer, Deutsche Bank  
Dr. Burkhard P. Varnholt, Chief Investment Officer, Head of Investments, UBS  
Reto Cueni, Chief Economist, Vontobel  
Jeff-Richard Angehrn, Chief Financial Officer, Raiffeisen  
Stefan Gerlach, Chief Economist, EFG Private Bank  
Dr. Francesco Mandalà, Chief Investment Officer, M&A Merchant Bank  
Rosa Sangiorgio, Head of Responsible Investing, Pictet  
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  
Alina Aroni, Senior Vice President, Lombard Odier  
Mercedes Grandes Ordoñez, Director, Edmond de Rothschild  
Ian Woodhouse, Board Advisor to Wealth Managers, Navigating Business Model, Technology Challenges and Opportunities. Formerly Accenture, IBM, PwC  
Caroline Babayéguidian, Director – Sustainability, Group Compliance, Regulatory & Governance, UBS

**REGISTER NOW**

# PRIVATE BANKING & WEALTH MANAGEMENT SWITZERLAND CONFERENCE AND AWARDS 2023

14<sup>th</sup> 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, Former Lead Wealth Management Business Model Transformation and Thought Leader for Europe, Accenture Wealth and Asset Management**

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

- Discuss the competitive landscape of Fintech and consolidation threats.
- Highlight trends impacting Swiss private banks; emerging markets, tech innovation, and sustainability regulations.
- Strategies and prepare for upcoming developments in the financial landscape.

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

09:20     ***Moxo***

09:40     **Future proofing Swiss Private Banks: Digital, Sustainability, and Client strategies**

- Highlight the needed evolution to digital, sustainable business models, and service innovations to maximise client growth and success in 2024.
- Discuss strategies to meet your bank's goals in 2024.

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

10:00     ***RWS***

10:20     ***REYL***

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**

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

**REYL**

**RWS**

**Moxo**

## 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*

**Stream B | Client-centric growth***Chaired by*

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

**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.
- Regulatory focus on AI Governance and Data Governance.
- Need to scale fast with agility and handle structured and unstructured data.
- Need for Data and AI frameworks to be code.
- What Data as a Product looks like and steps to get there?
- Data awareness and literacy for the whole organisation (and the whole world).

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

**11:50 Invest Cloud**
**12:10 Boosting Productivity and Profits: How Technology can Elevate Efficient Growth**

- Learn 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, Raiffeisen**

**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**

**11:50 Finfox**
**12:10 Client Centric 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 client centric investing is, and how a client centric mindset can strengthen relationships and growth.
- What are MBaer Merchant Bank doing to support client centric investments?

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

12:30	<b>CID</b>	12:30	<b>Vendor</b>
12:50	<p><b>Panel Discussion   Digital Disruption or Digital Delight? Looking towards the digitalisation of Private Banking</b></p> <p><b>Chair:</b> 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 &amp; Process Engineering, Julius Baer  Yiping Li, International Private Bank EMEA, Chief Operating Officer, Deutsche Bank Service Now  Jeff-Richard Angehrn, Chief Financial Officer, Raiffeisen  Invest Cloud  CID</p>	12:50	<p><b>Panel Discussion   Fuelling growth through client focus; what do clients want from their banks?</b></p> <p><b>Chair:</b> Caroline Babayéguidian, Director – Sustainability, Group Compliance, Regulatory &amp; Governance, UBS  Alina Aroni, Senior Vice President, Lombard Odier  Dr. Francesco Mandalà, Chief Investment Officer, MBaer Merchant Bank  Finfox</p>
13:10	<b>Lunch and Networking</b>		

### 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 **Azqore**

14:30 **Velexa**

14:50 **In Search for Growth in a Dynamic Market**

- Navigate competitive pressures facing Swiss private banks.
- Discuss opportunities for consolidation.

#### 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.

**Reto Cueni, Chief Economist, Vontobel**

14:30 **Vendor**

14:50 **‘Monetary policy is tightening’: A Swiss perspective**

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

- Create a roadmap and business model for strategic growth.

**Nayana Talwar, Head Private Clients & Family Offices, Sygnum Bank**

**15:10 The Evolution of Private Banking in Switzerland: Opportunity and risk in Emerging Markets**

- Uncover the development of the Swiss socio-economic landscape in the last 12 years.
- Assess, understand, and learn how to navigate future periods of risk and crisis, using hindsight.
- Explore a case study on Latin America's unique risks and opportunities.

**Mercedes Grandes Ordoñez, Director, Edmond de Rothschild**

**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**

**Mercedes Grandes Ordoñez, Director, Edmond de Rothschild**

**Velexa**

**Azqore**

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

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

**15:10 Vendor**

**15:30 Panel Discussion | The Evolving Landscape: Opportunities and Risks in Alternative Assets**

**Chair: Caroline Babayéguidian, Director – Sustainability, Group Compliance, Regulatory & Governance, UBS**

**Reto Cueni, Chief Economist, Vontobel**

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

**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, Plan, and Predict: A Global Market Outlook**

- 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, Chief Investment Officer, Head of Investments, UBS**

- 16:30      ***Vendor***
- 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**  
**Burkhard P. Varnholt, Chief Investment Officer, Head of Investments, UBS**
- 17:20      **Close of Conference**
- 18:30      **Drinks Reception**
- 19:30      **Private Banking & Wealth Management Switzerland 2023 Awards Ceremony**