



**Dr. Philippe Sormani**  
Chairman of the Board,  
Partner IAZI AG - CIFI SA



**Prof. Dr. Jan-Egbert Sturm**  
KOF - ETH Zürich



**Prof. Dr. Falko Paetzold\***  
EBS Universität & CSP  
Universität Zürich

### Partners



**Karsten Guettler**  
UBS Asset Management  
Head SI Asset Management



**Michael Haupt**  
Bank Vontobel AG  
Senior Advisor Structured  
Solutions & Investments



**Guillaume Levannier**  
Lombard Odier Asset  
Management  
(Switzerland) SA  
Sustainable Investment  
Manager



**Norbert Ruecker**  
Bank Julius Bär & Co. AG  
Head of Economics and Next  
Generation Research

### Information

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\*Unavailable due to business travel



Verband Schweizerischer Vermögensverwalter | VSV  
Association Suisse des Gestionnaires de fortune | ASG  
Associazione Svizzera di Gestori patrimoniali | ASG  
Swiss Association of Wealth Managers | SAM

# Annual Congress | SAM

Swiss Association of Wealth Managers

Date 18 November 2022

Venue Fédération des Entreprises  
Romandes (FER) - Genève

Time 10:30 - 16:30

### Partners

Julius Bär

17 96

LOMBARD ODIER  
LOMBARD ODIER DARTIER HENTSCH



Vontobel

21SHARES

BancaStato

CIC



PICTET  
1805

REYL  
INTESA SANPAOLO

Swissquote

Vanguard

Media Partner

AGEFI

10:30 - 11:00

Welcome Drink (Meeting Point - Partner Stands)

Bank Julius Bär & Co. AG

Banque Lombard Odier & Cie SA

UBS Switzerland AG

Bank Vontobel AG

11:00 - 11:15

**Serge Pavoncello, President SAM**

Welcome Speech

11:15 - 12:00

**Angela de Wolff, Founding Partner Conser / Swiss Investment Fund for Emerging Markets (SIFEM)**

Opening Keynote:

Sustainable finance without taboo: an exchange of views with a touch of humor and much realism

with the participation of **Loïc Schmid**, Chief Investment Officer Asset Management / 1875 Finance

12:15 - 13:15

Lunch Break (FER - Top Floor)

13:30 - 14:30

**Workshops Scientific Committee**

English

**Prof. Dr. Robert Danon, Danon, Lausanne/University of Lausanne & Prof. Dr. Guglielmo Maisto, Maisto & Associati, Milan/Università Cattolica di Piacenza**

Taxation of high net worth individuals and global families

English

**RA Alexander Rabian, Streichenberg und Partner Rechtsanwälte**

Greenwashing – Caught between prosecutors, regulators and political protection:

*Guidance through the ESG-jungle for Swiss wealth managers – along Swiss and EU regulations*

French

**Dr. Philippe Sormani, Chairman of the Board, Partner IAZI AG - CIFI SA**

Latest trends in the real estate market and related ESG matters

With the participation of Roxane Montagner & Raphaël Gabella (IAZI AG – CIFI SA)

English

**Prof. Dr. Jan-Egbert Sturm, KOF - ETH Zürich**

Understanding today's inflation

14:30 - 15:00

Coffee Break (Meeting Point - Partner Stands)

15:00 - 16:20

**Panel Partners**

Moderator: Andrew Douglas CFA, CSP, University of Zurich

**Karsten Guettler, Head SI Asset Management**

UBS Asset Management

Proprietary ESG system for assessment and rating / scoring

**Michael Haupt, Senior Advisor Structured Solutions & Investments**

Bank Vontobel AG

How to manage sustainable strategies with AMC's?

**Guillaume Levannier, Sustainable Investment Manager**

Lombard Odier Investment Manager

The Net Zero challenge: How to invest in line with the objectives of the Paris Agreement?

**Norbert Ruecker, Head of Economics and Next Generation Research**

Bank Julius Bär & Co. AG

Unlocking the value of ESG data

16:20

**Annick Weizman, Head of Training SAM**

**Serge Pavoncello, President SAM**

Concluding words

**Keynote Speech**



**Angela de Wolff**

Founding Partner Conser / Swiss Investment Fund for Emerging Markets (SIFEM)



With the participation of **Loïc Schmid**

Chief Investment Officer Asset Management / 1875 Finance

**Scientific Committee**



**Prof. Dr. Robert Danon**

Danon, Lausanne / University of Lausanne



**RA Alexander Rabian**

Streichenberg und Partner Rechtsanwälte