

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

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 <b>Loïc Schmid</b> , 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



#### **Keynote Speech**



**Angela de Wolff** 1 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





**Dr. Philippe Sormani** I 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

#### **Panel Partners**



Karsten Guettler | Head SI Asset Management UBS Asset Management



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



**Guillaume Levannier** 1 Sustainable Investment Manager Lombard Odier Asset Management (Switzerland SA)



**Norbert Ruecker** 1 Head of Economics and Next Generation Research Bank Julius Bär & Co. AG

#### Information

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\*Unavailable due to business travel

Partners



Julius Bär





# Vontobel





