



**Prof. Dr. Jan-Egbert Sturm**  
KOF - ETH Zürich  
Unavailable due to business travel

### Workshop Speakers



**Andrew Douglas**  
CFA; Universität Zürich  
Dept. for Banking and  
Finance, CSP



**Nicola Stalder**  
Head of Analytics, CIFI

### Partners



**Andri Bösch**  
Bank Vontobel AG  
Head External Asset  
Managers and Member of the  
WM Management Board



**Marc Giesbrecht**  
Banque Lombard Odier  
& Cie SA  
Interim Chief Investment  
Officer



**Hannes Huett**  
UBS Switzerland AG  
Head of Quantitative  
Strategies at UBS Global  
Wealth Management  
Chief Investment Office



**Roland von Horn**  
Bank Julius Baer  
Digital Channels Products  
Owner

### Information

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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 24 November 2023

Venue SIX ConventionPoint - Zurich

Time 10:30 - 16:00

### Partners



10:30 - 11:00

Welcome Drink (SIX ConventionPoint - Foyer)

11:00

Welcoming Words (Auditorium)

**Annick Weizman, Head of Training, SAM**

11:00 - 11:45

Opening Keynote

**Prof. Dr. Erich Walter Farkas, Quantitative Finance, UZH & ETH**

AI Portfolio Management: Opportunities and Challenges

11:50 - 12:35

Partners Panel

**Moderator: Serge Pavoncello, President, SAM**

Performance and Innovation: How to assess technological opportunities and investment potential in wealth management?

**Andri Bösch, Head External Asset Managers and member of the WM Management Board**  
Bank Vontobel AG

**Marc Giesbrecht, Interim Chief Investment Officer**  
Banque Lombard Odier & Cie SA

**Hannes Huett, Head Quantitative Strategies at UBS Global Wealth Management Chief Investment Office**  
UBS Switzerland AG

**Roland von Horn, Digital Channels Product Owner**  
Bank Julius Baer

12:35 - 13:45

Lunch Break (SIX ConventionPoint - Foyer)

13:45 - 14:45

Workshops Scientific Committee (Workshop rooms)

English

**Prof. Dr. Robert Danon, Danon, Lausanne University of Lausanne**

Mobility of Global Families and Entrepreneurs: The prevention and resolution of international tax disputes

English

**Dr. Falko Paetzold, Universität Zürich, Dept. for Banking & Finance, CSP**

With the participation of Andrew Douglas, CFA; Universität Zürich, Dept. for Banking & Finance, CSP

Do investors care about more than financial performance? Evidence from academia and UHNW sustainable investors

German

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

Performance und Haftung: Zum Management von Rechtsrisiken im Zusammenhang mit enttäuschten Anlegererwartungen

German

**Dr. Philippe Sormani, Co-Founder IAZI AG - CIFI SA**

With the participation of Nicola Stalder, Head of Analytics, CIFI  
Performancemessung für Immobilien Direktanlagen

14:50 - 15:15

Wrap-up Scientific Committee (Auditorium)

Concluding words

**Serge Pavoncello, President, SAM**  
**Annick Weizman, Head of Training, SAM**

15:15 - 16:00

Networking Coffee (SIX ConventionPoint - Foyer)

### Keynote Speech



**Prof. Dr. Erich Walter Farkas**  
Quantitative Finance, UZH & ETH

### Scientific Committee



**Prof. Dr. Robert Danon**  
Danon, Lausanne  
University of Lausanne



**Dr. Falko Paetzold**  
Universität Zürich,  
Dept. for Banking &  
Finance, CSP



**RA Alexander Rabian**  
Streichenberg und  
Partner Rechtsanwälte



**Dr. Philippe Sormani**  
Co-Founder IAZI AG -  
CIFI SA