

08:00-09:00 Registration & Welcome Refreshments

09:00-09:10 **Welcome Address: Ronan McCaughey, Editor, Private Banker International**

**PRIVATE BANKER**  
INTERNATIONAL

## SESSION ONE: The Private Banking Landscape in Europe – A View from Switzerland



**Chairperson: Ronan McCaughey, Editor, Private Banker International**

**PRIVATE BANKER**  
INTERNATIONAL

09:10-09:30

**What Markets Await Private Banking Clients in 2018?**

- State of the market in Europe following US Elections: The Trump Effect and Brexit – What we know so far
- The outlook for M&A and the financial section as QE winds down
- Risk to watch for and strategies to deal with them



**David Stubbs, Head of Client Investment Strategy for EMEA, J.P. Morgan**

**J.P.Morgan**

09:30-09:40

**Q&A with David Stubbs**

09:40-10:00

**The Importance of Data in Digital Banking**

- Data needs to deliver digital banking services
- Data collection and storage
- Is the industry ready?



**Tobias Unger, CEO, Avaloq Sourcing, Switzerland & Liechtenstein**

**avaloq**  
essential for banking

10:00-10:20

**Société Générale: A Family Office Point of View**

- Key developments in the family office market
- A view on requirements
- Tomorrow's coverage set-up



**Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, Société Générale Private Banking Switzerland**

**SOCIETE GENERALE**  
Private Banking

10:20-10:40

**Do we Need Artificial Intelligence in Wealth Management?**

- The latest robo-advisors, chatbots and AI
- Reaching goal based targets
- Enhancing the customer experience



**Andrzej Przewięźlikowski, Vice President, Director of Financial Services Division, Comarch**

**COMARCH**

10:40-11:10

**Speaker discussion & Q&A**

*Moderated by Ronan McCaughey, Editor, Private Banker International*

*Speakers include:*

**Tobias Unger, CEO, Avaloq Sourcing, Switzerland & Liechtenstein**

**Andrzej Przewięźlikowski, Vice President, Director of Financial Services Division, Comarch**

**Tobias Christen, CEO, DSwiss AG**

**Tobias Wagner, Head of Zurich Branch & Member of the Executive Committee, Société Générale Private Banking Switzerland**

**PRIVATE BANKER**  
INTERNATIONAL

**avaloq**  
essential for banking

**COMARCH**

**DSwiss**  
SECURE DIGITAL SERVICES

**SOCIETE GENERALE**  
Private Banking

11:10-11:40

**Networking Coffee Break**

## SESSION TWO: Capitalising on Fast Growing Market Segments in the Swiss Market



**Chairperson: Oliver Williams**, Head & Co-Founder, **WealthInsight**

**WEALTHINSIGHT**

11:40-12:00

### **Sustainable and Responsible Investments: Driving Purpose and Performance**

- Gathering momentum: evolution and challenges of sustainable investing
- Enhance shareholder value with responsible corporate practices
- Investing with BNP Paribas - A committed and responsible bank



**Hubert Musseau**, CEO Wealth Management in Switzerland and Emerging Markets, **BNP Paribas**



**BNP PARIBAS**

12:00-12:20

### **Can Innovative Technology Determine the Regulatory Future?**

- How can RegTech manage compliance risks?
- What are the risks of jumping on the RegTech bandwagon?
- Meeting the demands of a broad client base
- What can RegTech offer the financial services industry?



**Guenther Dobrauz**, Partner, Leader PwC Legal Switzerland, **PwC**



12:20-12:40

### **Combining the Advantages of Swiss Private Banking with Modern Wealth Management**

- Expanding client offering with innovative investment solutions
- Successfully matching client risk profiles
- Providing relevant and effective solutions to create value



**Luc Filip**, Head of Discretionary Portfolio Management and Wealth Management Investments, **Banque SYZ**

**SYZ** WEALTH MANAGEMENT

12:40-13:10

### **Speaker discussion and Q&A**

*Moderated by Oliver Williams, Head & Co-Founder, WealthInsight*

**WEALTHINSIGHT**

*Speakers include:*

**Luc Filip**, Head of Discretionary Portfolio Management and Wealth Management Investments, **Banque SYZ**

**SYZ** WEALTH MANAGEMENT

**Hubert Musseau**, CEO Wealth Management in Switzerland and Emerging Markets, **BNP Paribas**



**BNP PARIBAS**



**José Dias Coelho**, Head of External Asset Management and Africa Desk, **Millennium Banque Privée**

**Millennium**  
banque privée

**Guenther Dobrauz**, Partner, Leader PwC Legal Switzerland, **PwC**



13:10-14:10

Networking Lunch

SESSION THREE: Enhancing Client and Advisor Relationships



**Chairperson: Ulrich Knopp**, Partner, **MilleniumAssociates**

millenium  
associates

14:10-14:30

**The Digital Advisory and Client Collaboration**

- Digital private banking
- Balancing sales and compliance
- Clients-advisor collaboration
- The contribution of AI
- Personalised client service models



**Alessandro Tonchia**, Founder, **Finantix**

Finantix

14:30-14:50

**What is the Future for Advisory Services?**

- Trends in wealth management: the world is changing – wealth managers have to adapt
- Understanding the key challenges in wealth management
- How to provide state of the art advice and exceed the clients expectations



**Nicolas de Skowronski**, Deputy Head of Advisory Solutions, **Julius Bär**

Julius Bär

14:50-15:10

**The Rise of FinTech and RegTech Start-ups in Swiss Private Banking**

- Orbium's experience in innovation and the ecosystem
- Introducing our start-up partnerships
- A view on how the future might evolve



**Olivier Schneider**, Partner, **Orbium**

orbium

15:10-15:40

**Speaker discussion and Q&A**

*Moderated by Ulrich Knopp, Partner, MilleniumAssociates*

*Speakers include:*

**Alessandro Tonchia**, Founder, **Finantix**

**Nicolas de Skowronski**, Deputy Head of Advisory Solutions, **Julius Bär**

**John Davies**, Chairman, **Kompli Global**

**Olivier Schneider**, Partner, **Orbium**

**Olga Feldmeier**, CEO and Founder, **Smart Valor**



millenium  
associates

Finantix

Julius Bär

kompli-global

In association with  
CAPCO

orbium

SMART  
VALOR

15:40-16:10

**Networking Coffee Break**

SESSION FOUR: Future Perspectives – Building a Roadmap Beyond 2017



**Chairperson: Ian Woodhouse**, Senior Business Advisor, **Orbium**



16:10-16:30

**Digital Disruption that Banks are Facing**

- Where is Citi Private Bank in the disruption cycle?
- Can banks have innovation and scale?
- How can banks improve their efficiency?
- Can incumbents in US and Europe embrace innovation?
- How are banks embracing innovation to augment the client experience?



**Philip Watson**, Managing Director, Head of Global Investment Lab,  
**Citi Private Bank**



16:30-17:15

**Expert Panel: Where is Private Banking Now and Where will it be by 2030?**

*Private Banking experts will discuss for or against Brexit, and the future of private banking in Switzerland and beyond*

**Discussion points will include:**

- Identifying new areas of alternative investments
- Switzerland's status as an international wealth management hub
- The future of asset allocation and goal based planning
- Will A.I and robo-advisors become the new norm?
- How far will technology go within the family office?
- Exploring growth within the impact investment market
- How will the lack of direct access to foreign markets affect Swiss private banking?

*Moderated by Ian Woodhouse, Senior Business Advisor, Orbium*

*Speakers include:*



**Michael Rogenmoser**, General Manager Switzerland & Liechtenstein, **Avaloq**



**Philip Watson**, Managing Director, Head of Global Investment Lab, **Citi Private Bank**



**Ekaterina Mavrenkova**, Managing Partner, **Henley & Partners**



**Alexander Sabo**, Market Head, Managing Director, Multi Family Offices,  
**HSBC Private Bank Region Switzerland**



**Tobias Wagner**, Head of Zurich Branch & Member of the Executive  
Committee, **Société Générale Private Banking Switzerland**



17:15-17:20

Closing Remarks by Ronan McCaughey

17:20

Close of Conference

18:30-22:00

Private Banker International Gala Dinner and Awards