



08:00-09:00 **Registration & Welcome Refreshments**

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

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



Chairperson: Ronan McCaughey, Editor, Private Banker International

PRIVATE BANKER

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

09:30-09:40

Q&A with David Stubbs

J.P.Morgan

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, Avalog Sourcing, Switzerland & Liechtenstein



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



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





10:40-11:10 **Speaker discussion & Q&A**

Moderated by Ronan McCaughey, Editor, Private Banker International Speakers include:



Tobias Unger, CEO, Avalog Sourcing, Switzerland & Liechtenstein

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



COMARCH



Tobias Christen, CEO, DSwiss AG

DSwiss

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



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**



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**



12:40-13:10

Speaker discussion and Q&A

Moderated by Oliver Williams, Head & Co-Founder, WealthInsight Speakers include:



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



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





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



Guenther Dobrauz, Partner, Leader PwC Legal Switzerland, PwC

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



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



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

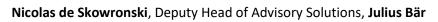


15:10-15:40

Speaker discussion and Q&A

Moderated by Ulrich Knopp, Partner, MilleniumAssociates Speakers include:

Alessandro Tonchia, Founder, Finantix





Olivier Schneider, Partner, Orbium

Olga Feldmeier, CEO and Founder, Smart Valor

millenium associates











15:40-16:10

Networking Coffee Break

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SESSION FOUR: Future Perspectives – Building a Roadmap Beyond 2017



Chairperson: Ian Woodhouse, Senior Business Advisor, Orbium



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?

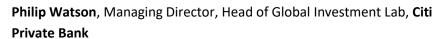


Moderated by Ian Woodhouse, Senior Business Advisor, Orbium Speakers include:

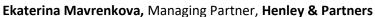




Michael Rogenmoser, General Manager Switzerland & Liechtenstein, Avalog



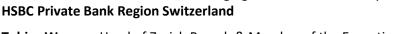




Alexander Sabo, Market Head, Managing Director, Multi Family Offices,



HSBC (X)





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

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17:20 Close of Conference

18:30-22:00 Private Banker International Gala Dinner and Awards