

08:00-09:00 Registration & Welcome Lunch

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



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



Chairperson: Ronan McCaughey, Editor, Private Banker International



09:10-09:30

Switzerland at the Forefront of the Private Banking World

- State of the market in Europe following US Elections: The Trump Effect and Brexit – What we know so far
- Consolidation in Europe's banking sector
- An insight into the current M&A environment

09:30-09:50

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



09:50-10:10

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, Investment Lab Management, Citi Private Bank



10:10-10:30

Improving the Customer Experience

- 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



10:30-11:00

Speaker discussion & Q&A

Speakers include:

Tobias Unger, CEO, Avaloq Sourcing, Switzerland & Liechtenstein

Philip Watson, Managing Director, Investment Lab Management, Citi Private Bank

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

Tobias Christen, CEO, DSwiss AG



11:00-11:30

Networking Coffee Break

SESSION TWO: Capitalising On Fast Growing Market Segments in the Swiss Market

Chairperson:

11:30-11:50

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

11:50-12:10

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?

Representative, PwC



12:10-12:30

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**



12:30-12:50

Société Générale: A Family Office Point of View



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



SOCIETE GENERALE
Private Banking

12:50-13:20

Speaker Discussion and Q&A

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**



BNP PARIBAS

Representative, Millennium Banque Privée



Representative, PwC



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



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13:20-14:20

Networking Lunch

SESSION THREE: Enhancing Client and Advisor Relationships

Chairperson:

14:20-14:50

The Emerging Digital Advisor

- How can a digital advisor enhance advisor-client management?
- Providing a hybrid offering to existing clients
- Attracting a new client base
- Prioritising and establishing a security strategy to keep clients safe

Representative, **Finantix**



14:50-15:10

The Rise of Investments in Swiss Start-Ups

- Outlining benefits start-ups can provide for the financial services industry and its clients
- Understanding how the industry is moving
- Playing an important role in the digitisation of traditional industries
- An insight into the new fintech rules in Switzerland

15:10-15:30

Investing in Digital Platforms for Wealth Management

- How will robo-advisors perform over time and will investors remain satisfied?
- Changing the traditional strategies in wealth management
- How can we excel from here?

15:30-15:50

The Rise of FinTechs and RegTech Startups in Swiss Private Banking

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



Olivier Schneider, Partner, **Orbium**



15:50-16:10

Speaker discussion and Q&A

Speakers include:

Representative, **Finantix**



Olivier Schneider, Partner, **Orbium**

John Davies, Chairman, **Kompli Global**



16:10-16:30

Networking Coffee Break

SESSION FOUR: Future Perspectives – Building A Roadmap Beyond 2017



16:30-16:50

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



Providing Tailored Solutions to UHNWI Clients

- Being strategic and tactical in catering to local and international wealth
- Innovative strategies for successful client onboarding
- The key to maintaining the trust and return of the customers long term

*Representative, Credit Suisse**



16:50-17:20

Expert Panel: Where is Private Banking Now and Where will it be by 2020?

Private Banking experts will discuss and debate 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?



Speakers include:

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



*Representative, Credit Suisse**



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



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



17:20-17:30

Closing Remarks and Close of Conference

18:30-22:00

Private Banker International Gala Dinner and Awards

*indicates speaker subject to change