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

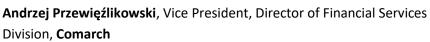
Speaker discussion & Q&A

#### Speakers include:

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

Philip Watson, Managing Director, Investment Lab Management, Citi









Tobias Christen, CEO, DSwiss AG



COMARCH

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 BNP PARIBAS Markets, 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?

Guenther Dobrauz, Partner, Leader PwC Legal Switzerland, 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



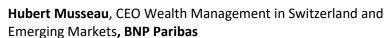
**Tobias Wagner**, Head of Zurich Branch & Member of the Executive Committee, **Societe Generale Private Banking Switzerland** 



12:50-13:20 Speaker Discussion and Q&A

Speakers include:

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



Representative, Millennium Banque Privee

Representative, PwC

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









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 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



#### 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



Finantix

lulius Bär

orbium

15:50-16:10 Speaker discussion and Q&A

Speakers include:

Representative, Finantix



Olivier Schneider, Partner, Orbium

John Davies, Chairman, Kompli Global

kompli-global\*
CAPCO

16:10-16:30 Networking Coffee Break



# SESSION FOUR: Future Perspectives – Building A Roadmap Beyond 2017



Chairperson: Ian Woodhouse, Senior Business Advisor, Orbium



16:30-16:50

## **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 Rogenmoser, General Manager Switzerland & Liechtenstein, Avalog





Representative, Credit Suisse

Henley & Partners



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

Ekaterina Mavrenkova, Managing Partner, Henley & Partners

SOCIETE GENERALE

17:20-17:30

Closing Remarks and Close of Conference

18:30-22:00

Private Banker International Gala Dinner and Awards

