

2010

12th International  
Private Banking and  
Wealth Management  
Retreat

September 12 – 16, 2010, Interlaken, Switzerland  
Victoria-Jungfrau Grand Hotel & Spa

swiss:finance:institute



# 12th International Private Banking and Wealth Management Retreat

## Objective

Organized by the Swiss Finance Institute, the International Private Banking and Wealth Management Retreat is an exclusive international platform for senior executives to assess and develop their strategic responses to the dramatic challenges faced by private banking and wealth management.

Wealth management is undergoing one of the most wrenching changes in its history. The Retreat discerns emerging trends and presents available strategic options. By providing you with the opportunity to discuss these with peers from leading institutions, the Retreat enables you to sharpen your insights, to refine your strategic plans, and to develop an integrated plan of action for your own business.

Specifically, the Retreat will strengthen your critical understanding by enabling you to:

- discuss ideas and best practices with industry leaders both on- and offshore
- understand the strategic, organizational and individual aspects of adapting private banking and wealth management to the new environment
- exchange views and experiences with your peers from around the world
- strengthen your international network

## Concept

The Retreat, led by Dr. Harry Hurzeler, Director at the Swiss Finance Institute, provides a logical framework within which to address the management issues faced in private banking and wealth management. Methods and tools specific to managing private banking, and based on world-class research and empirical evidence, are presented within this framework. CEOs from both on- and offshore companies put these concepts into the context of the market and the institutional culture. And challenging discussions then add the individual experience of each participant so that true insights can be developed.

Group work, case discussions and even the social events are all finely tuned to achieve a maximum of mutual learning.

## Participant Profile: Who will you meet?

The Retreat is specifically designed for senior executives from private banking and wealth management institutions, typically on a Managing Director level. Admittance is selective, and the Swiss Finance Institute takes great care to ensure an international mix of peers. Typically, two thirds of participants are CEOs of a business area or are on the Executive Committee. About two thirds of participants are non-Swiss.



“For me in my new role as country head, the Retreat was an outstanding opportunity to get a deeper insight into the challenges I am facing; the Retreat provided me with a number of excellent actionable ideas which I will implement.”

Jukka Perttula, Head of Private Banking Finland, Nordea Bank Finland; Participant in the 2009 Retreat

# Program

## Sunday, September 12 – The Logic of Market Strategy

Opens 6:00 pm

### Monday, September 13 – Standing out in the Crowd

#### Differentiation through Focus: The Case of Coutts

Nick Gornall, Head of Entrepreneur Segment and SE UK Coutts

#### Geographic Differences: Private Banking in China

Jacques Mechelany, CEO Bank of China Private Banking

#### Communicating and Delivering a unique Brand Promise at Credit Suisse

Manfred Stuetzgen, Global Head of Branding, CSG

#### Making a Difference through Philanthropy: Learning from Banque de Luxembourg

Philippe Depoorter, Member of the Board, Bank of Luxembourg

Etienne Eichenberger, CEO Wise

### Tuesday, September 14 – The new World of Cross Border Banking

#### Cross Border Private Banking: Laying out the Issues

Dr. Urs Roth, CEO Swiss Bankers Association

#### Adapting to a Transparent World

Philip Marcovici, CEO LawInContext

#### Cross Border Banking: The Experience of Julius Baer

Bernhard Keller, CEO Switzerland Julius Baer

#### The Future of Cross Border Private Banking - The View of Deutsche Bank

Marco Bizzozero, CEO Deutsche Bank (Schweiz)

### Wednesday, September 15 – Building Trust & delivering Value efficiently

#### Lean Quality

Joachim Straehle, CEO Bank Sarasin

#### Behavioral Finance

Prof. Thorsten Hens, University of Zurich

#### Building Private Banking in Asia

Kathryn Shih, Head UBS Wealth Management Asia

#### Delivering Value, Building Trust at JP Morgan

Felipe Godard, Managing Director, JP Morgan Private Banking

### Thursday, September 16 – The Future of Wealth Management

#### Emerging Trends and strategic Responses at Royal Bank of Canada

Michael Lagopolous, CEO Private Banking International, Royal Bank of Canada

#### Emerging Trends and strategic Responses at HSBC

Alexandre Zeller, CEO HSBC Private Banking

#### The Positioning of Insinger de Beaufort: The Best of both Worlds

Peter Sieradzki, CEO Insinger de Beaufort

Ends 2:30 pm

Red is the topic taught during the day. Black are specific contributions by guest speakers. Program subject to change.





“The Retreat was an excellent opportunity to test and refine my ideas on domestic and international wealth management; the in-depth discussions with industry leaders and peers from other reputed institutions were unique.”

Armin Eiche, Head of PWM Wuerttemberg and Head of CBOs North America/Switzerland/Austria, Deutsche Bank AG; Participant in the 2009 Retreat

#### **Schedule**

The Retreat runs from Sunday September 12, 6:00 pm to Thursday September 16, 2:30 pm. Lectures usually take place between 8:00 am and 5:30 pm. Evenings are reserved for special events.

#### **Venue**

The Victoria-Jungfrau Grand Hotel & Spa in Interlaken is one of the most prestigious grand hotels in Switzerland. The hotel embodies the timeless tradition of hospitality, combining the charm and atmosphere of the past with all the amenities of the present. Providing a superb learning infrastructure, it is an excellent setting for a productive Retreat. Detailed information can be found on [www.victoria-jungfrau.ch](http://www.victoria-jungfrau.ch).

Interlaken is an enchanting town at the heart of the Bernese Alpine region. The town is surrounded by lakes, forest and the famous Mount Eiger and Mount Jungfrau. The venue is easily reached from Switzerland's main airports in Zurich and Geneva.

#### **Application**

To register for the 12th International Private Banking and Wealth Management Retreat, please complete the enclosed registration form and return it to the Swiss Finance Institute by July 17, 2010. Early registration is recommended.

#### **Fees**

The fees are CHF 9'900.00 (incl. VAT) which cover tuition, course material, lunches, dinners, refreshments and special events. Hotel accommodation (incl. breakfast) is charged separately.

#### **Language**

The Retreat is conducted in English.

#### **Certificate**

On completion of the Retreat, participants will receive a Certificate of Attendance.

#### **Further information and inquiries**

More detailed information can be found on our web site [www.SwissFinanceInstitute.ch](http://www.SwissFinanceInstitute.ch) or contact Jasmin Weissmann: T +41 (0)44 254 30 89, [Jasmin.Weissmann@sfi.ch](mailto:Jasmin.Weissmann@sfi.ch)

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