



association of the
luxembourg fund industry



SWITZERLAND ROADSHOW

**Luxembourg:
The Global Fund Centre**

**Hotel Marriott Zurich
9 November 2016**

Programme Zurich, 9 November

08.15 – 09.00 **Registration & breakfast**

09.00 – 09.15 **Welcome**

Camille Thommes, Director General, ALFI

09.15 – 09.20 **Chairperson's introduction**

Gilbert Schintgen, CEO, UBS Fund Management (Luxembourg) S.A.

09.20 – 09.35 **Opening speech by** H.E. Pierre Gramegna, Minister of Finance, Luxembourg

09.35 – 10.00 **The current political turbulence and its possible effects on the financial services industry**

Simon Bryceson, Issues Management & Strategy Consultant, Region of Brussels

10.00 – 10.30 **Refreshment break**

10.30 – 11.15 **CEO panel – New realities**

- Political disruption
- Impact on business models
- New investment behaviors
 - Fintech
 - digital distribution
 - robot advise

Moderator: Nicolas Mackel, CEO, Luxembourg for Finance, Luxembourg

Panelists: Christoph Habluetzel, Managing Director, Head of Switzerland, Lombard International Assurance S.A., Zurich
Heinz Hofmann, Chief Executive, HSBC Global Asset Management (Switzerland) Ltd, Zurich
Martin Möller, Digital Strategy & Transformation, Credit Suisse Financial Services, Zurich

11.15 – 12.00 **New opportunities – New products**

- («1 + 1 = 3»)
- RAIF
- ELTIFs
- Debt funds
- AIFMD II

Moderator: Olivier Carré, Partner, PwC, Luxembourg

Panelists: Gudrun Göbel, Executive Director – Network & Client Relationships, FundRock Management Company S.A., Luxembourg
Gast Juncker, Partner, Elvinger Hoss Prussen, Luxembourg
Dominik Rutishauser, Executive Director, Head Business Development Private Labelling, GAM Investment Management (Switzerland) Ltd., Zurich

12.00 – 12.05 **Chairperson's wrap up**

Gilbert Schintgen, CEO, UBS Fund Management (Luxembourg) S.A.

12.05 – 13.45 **Buffet lunch followed by practical workshops**

Programme Zurich, 9 November

13.45 – 14.45 Practical workshops - Stream I

MAINSTREAM UCITS

Chairperson's introduction

Simon Ramos, Partner, Deloitte, Luxembourg

- UCITS V
 - Depositary
 - Remuneration
 - Sanctions
- Innovative UCITS strategies & new trends and developments
 - PRIIPS
 - MMF
 - MiFID II: new distribution models
 - ETFs
 - Update on swing pricing
- Crossborder distribution: latest update

Testimonial talk: Martin Jufer, Member of the Group Management Board, Head of Operations, GAM, Zurich

Moderator: Simon Ramos, Partner, Deloitte, Luxembourg

Panelists: Joëlle Hauser, Partner, Investment Funds, Clifford Chance, Luxembourg
Steve David, Country Head, Northern Trust Luxembourg
Martin Jufer, Member of the Group Management Board, Head of Operations, GAM, Zurich
Stéphane Ries, Head of Institutions Desk - Group Business Development, KBL European Private Bankers, S.A., Luxembourg

PRIVATE EQUITY STRUCTURES

Chairperson's introduction

Kai Braun, Partner, EY, Luxembourg

- Société en commandite spéciale (SCSP): a success story in Luxembourg
- RAIF
- Negative interest rate environment
- Private Equity and Private Banking
- Impact of the German investment tax reform on Luxembourg PE structures
- Cross-border distribution
- Solvency II: investment regulation

Testimonial talk: Yvonne Stillhart, Independent Chairman of Private Equity organizations, Enoha GmbH

Moderator: Kai Braun, Partner, EY, Luxembourg

Panelists: Kavitha Ramachandran, Senior Manager Business Development and Client Relations, Maitland Group
Yvonne Stillhart, Independent Chairman of Private Equity organizations, Enoha GmbH
Yannick Arbaut, Investment Management Counsel, Allen & Overy, Luxembourg
Giuliano Bidoli, Partner, KPMG, Luxembourg

14.45 – 15.45 Practical workshops - Stream II

RESPONSIBLE INVESTING

Chairperson's introduction

Sachin S. Vankalas, Head of Operations & Sustainability, LuxFLAG, Luxembourg

- Influence of sustainable asset classes within traditional asset management
- Climate change through climate finance
 - green bonds
 - carbon footprint
- Acceleration of Fintech and digitalization in microfinance and impact investing
- Sustainability used as risk management tool such as ESG screening and active engagement

Testimonial talk: Christian Hertz, Legal Director, Luxembourg Investment Solutions S.A.

Moderator: Sachin S. Vankalas, Head of Operations & Sustainability, LuxFLAG, Luxembourg

Panelists: Angela de Wolff, Founding Partner Conser, Vice President Swiss Sustainable Finance, Geneva
Maurice Bauer, Secretary General, Luxembourg Stock Exchange
Eric Borremans, Sustainability Expert, Pictet Asset Management, Geneva
Christian Hertz, Legal Director, Luxembourg Investment Solutions S.A.
Fabio Sofia, President of Sustainable Finance Geneva & Executive Director, Head of Client Relationship, Symbiotics, Geneva

REAL ESTATE STRUCTURES & DEBT FUNDS

Chairperson's introduction

Germain Birgen, Directeur, Banque de Luxembourg S.A.

- Société en commandite spéciale (SCSP): a success story in Luxembourg
- RAIF
- Debt funds
- Infrastructure investments
- ELTIFs
- Cross-border distribution
- Solvency II: investment regulation

Testimonial talk: Dr. Thomas Goergen, Managing Partner, Luxembourg Investment Solutions S.A.

Moderator: Germain Birgen, Directeur, Banque de Luxembourg S.A.

Panelists: Yves Cheret, Director, Crestbridge S.A., Luxembourg
Gilles Dusemon, Partner, Arendt & Medernach, Luxembourg
Dr. Thomas Goergen, Managing Partner, Luxembourg Investment Solutions S.A.
Marc Meyers, Partner, Loyens & Loeff, Luxembourg

15.45– 17.00

Closing coffee

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