

# 6<sup>th</sup> PRIVATE BANKING SUMMIT

## PROFITABILITY AND GROWTH

4<sup>th</sup> and 5<sup>th</sup> September 2007 | Kongresshaus, Zurich

6<sup>th</sup> September 2007 | Kongresshaus, Zurich

### KEYNOTE SPEAKERS



**PIERRE DE WECK**  
Member of the Group  
Executive Committee,  
Deutsche Bank AG, London



**CHRIS M MEARES**  
CEO Group Private Banking,  
HSBC Holdings plc., London



**JOHN A. FRASER**  
Chairman and CEO UBS  
Global Asset Management,  
London



**ROBERT PARKER**  
Vice Chairman Asset  
Management,  
Credit Suisse, London

### PANELISTS AND SPEAKERS



**ANDREAS BRODTMANN**  
Partner, Berenberg Bank,  
Hamburg



**SARAH OWEN-JONES**  
Chief Risk Officer Coutts  
International, Coutts Bank von  
Ernst Ltd, Zurich



**ANTHONY DECHELLIS**  
Head of Private Banking  
Americas, Credit Suisse,  
New York



**DR. SAVERIO PERISSINOTTO**  
Deputy CEO Group Private  
Banking, Banca Intesa  
Sanpaolo, Milan



**WALTER THOMA**  
Member of the Group  
Executive Management and  
Head of Private Banking,  
Vontobel Group, Zurich



**SERGE ROBIN**  
CEO and General Manager,  
Merrill Lynch Bank  
(Suisse) S.A., Geneva

Banco Santander (Suisse) S.A., Geneva  
Bank Frey & Co. AG, Zurich  
Bank Julius Baer & Co. Ltd., Zurich  
Bank Sarasin & Cie AG, Basel  
Barclays Wealth, London  
BNP Paribas (Suisse) SA, Geneva  
EFG International, Zurich  
Horizon21, Pfaeffikon  
McKinsey & Company, Inc. Switzerland,  
Zurich  
MilleniumAssociates AG, Zug

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University of Lausanne

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**EDWARD TAYLOR**  
The Wall Street Journal Europe

### POST-CONFERENCE DAY

## FAMILY OFFICE

### SPEAKERS

**JEREMY ARNOLD**  
Barclays PLC, London  
**SEBASTIAN DOVEY**  
Scorpio Partnership Ltd, London  
**LUDWIG FORREST**  
King Baudouin Foundation, Brussels  
**MARTYN GOWAR**  
Lawrence Graham LLP, London  
**PETER LEACH**  
BDO Stoy Hayward LLP, London  
**PENNY LOVELL**  
Fleming Family & Partners, London  
**MICHAEL MASLINSKI**  
Maslinski & Co Ltd, London  
**RICHARD WYATT-HAINES**  
University of Exeter, Exeter  
**OLIVIER ZUCKER**  
Barclays PLC, London

### CHAIRMAN

**NICHOLAS DALE**  
HSBC Guyerzeller Bank Ltd, Zurich

Knowledge partner  
of the post-conference day



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## PROFITABILITY AND GROWTH

Growth rates in the private banking industry have indeed benefited from very favourable financial markets. But it would nonetheless be a mistake to view the industry through rose coloured glasses: the business is becoming ever-more demanding. Complexity is increasing extremely fast at many different levels and rapid, ongoing internationalisation is a must for many players. Increasingly sophisticated clients demand investment performance, they want transparency and professional, comprehensive service. Competition for the sought-after clientele in the High and Ultra High Net Worth segment(s) (HNW and UHNW) is fierce in every part of the world. Markets develop fast, and occasionally even wildly, in the high-growth areas – the new markets in Eastern Europe, Asia and Latin America – while in the established markets every single business move seems to be dominated by an increasing amount of regulation, which drives up costs.

Where is growth to be found and how are new market opportunities to be seized, especially abroad? Which strategies will help in taking on the future challenges? Does a private bank really have to be big and act worldwide to survive in the long run? What about small and beautiful? Which niches for smaller players are promising and how can they be exploited profitably?

Take advantage of an unparalleled chance to learn about these new opportunities.

We look forward to welcoming you to our Private Banking Summit 2007.



Claudia Gabriel  
Editor-in-Chief, Schweizer Bank



François Schaller  
Editor-in-Chief, Private Banking

### Agenda PRIVATE BANKING SUMMIT 2007

- Measures to ensure sustainable growth
- The future of private banking: the bigger the better?
- New niche market strategies
- Near-banks: fierce new competitors servicing UHNWI
- Onshore private banking in the Americas and in Asia
- Strategic issues in global asset management
- The value of a private bank – strategic considerations and pitfalls

### Agenda post-conference day FAMILY OFFICE

- What clients really want and what providers offer
- The 21st century adviser – a fresh perspective
- Safeguarding the hopes and resolving the fears of the ultra wealthy
- Special guest speaker: Ludwig Forrest, King Baudouin Foundation

### Panelists, speakers and chair



**Gerard Aquilina**, Managing Director and Head of Barclays International Private Bank at Barclays Wealth, Barclays PLC, London



**Jeremy Arnold**, Managing Director and Head of Wealth Advisory at Barclays Wealth, Barclays PLC, London



**Javier Arús**, Managing Director, Banco Santander (Suisse) S.A., Geneva



**Gregor Bienz**, CEO, Bank Frey & Co. AG, Zurich



**Andreas Brodtmann**, Partner and Member of the Executive Board, Berenberg Bank, Hamburg



**Prof. Teodoro D. Cocca**, Chair for Wealth and Asset Management, Johannes Kepler University of Linz



**Boris F.J. Collardi**, Chief Operating Officer Private Banking, Bank Julius Baer & Co. Ltd., Zurich



**Nicholas Dale**, Member of the Enlarged Executive Committee, HSBC Guyerzeller Bank Ltd, Zurich



**Anthony DeChellis**, Head of Private Banking Americas, Credit Suisse, New York



**Pierre de Weck**, Member of the Group Executive Committee, Deutsche Bank AG and Global Head of Private Wealth Management



**Fidelis M. Goetz**, Head of Division International and Member of Group Executive Committee, Bank Sarasin & Cie AG, Basel



**Dr. Saverio Perissinotto**, Deputy CEO Group Private Banking, Banca Intesa Sanpaolo, Milan



**Sebastian Dovey**, Founding Director and Managing Partner, Scorpio Partnership Ltd, London



**Martyn Gowar**, Consultant Tax & Private Capital, Lawrence Graham LLP, London



**Serge Robin**, CEO and General Manager, Merrill Lynch Bank (Suisse) S.A., Geneva



**Prof. Bernard Dumas**, Swiss Finance Institute, University of Lausanne



**Peter Leach**, Partner, BDO Stoy Hayward LLP, London



**Ray Soudah**, Founder and CEO, MilleniumAssociates AG, Zug



**Patrick du Saint**, Head of Private Banking, BNP Paribas (Suisse) SA, Geneva



**Penny Lovell**, Group Head of Business Development, Fleming Family & Partners, London



**Edward Taylor**, Journalist Banking, The Wall Street Journal Europe, Frankfurt am Main



**Eftychia (La) Fischer**, Member of the Executive Committee, EFG International, Zurich



**Michael Maslinski**, Director, Maslinski & Co Ltd, London



**Walter Thoma**, Member of the Group Executive Management and Head of Private Banking, Vontobel Group, Zurich



**Ludwig Forrest**, Project Manager, King Baudouin Foundation, Brussels



**Chris M Meares**, CEO Group Private Banking, HSBC Holdings plc., London



**Dr. Felix Wenger**, Partner, McKinsey & Company, Inc. Switzerland, Zurich



**John A. Fraser**, Chairman and CEO UBS Global Asset Management and Member of the UBS Group Executive Board, London



**Sarah Owen-Jones**, Chief Risk Officer Coutts International, Coutts Bank von Ernst Ltd, Zurich



**Richard Wyatt-Haines**, Chartered Marketer and Leadership Fellow of the University of Exeter



**Matthias Frisch**, Chief Executive Officer, Horizon21 Wealth Management, Pfaeffikon



**Robert Parker**, Vice Chairman Asset Management, Credit Suisse, London



**Olivier Zucker**, Director, Private Bank at Barclays Wealth, Barclays PLC, London

For more detailed information about speakers, panelists and chairmen please visit [www.private-banking-summit.com](http://www.private-banking-summit.com)

Tuesday, 4th September 2007

8.30

Reception with coffee, tea and croissants  
Distribution of conference documentation

9.00

#### Chairman's introduction and overview

Prof. Teodoro D. Cocca, Chair for Wealth and Asset  
Management, Johannes Kepler University of Linz

### INTERNATIONAL COMPETITIVENESS

9.15

#### The state of the private banking industry

- Overview of market developments
- Industry leadership
- Competition leadership

Prof. Teodoro D. Cocca, Chair for Wealth and Asset  
Management, Johannes Kepler University of Linz

9.45

#### The Financial Managers

#### Growth Strategy of Vontobel Private Banking

- Positioning & value proposition
- Integrated business model
- Integrated advisory approach

Walter Thoma, Member of the Group Executive Management  
and Head of Private Banking, Vontobel Group, Zurich

10.15

#### Questions/discussion

10.30

Coffee break

### THE FUTURE OF PRIVATE BANKING

11.00

#### Keynote Speech

#### The future of global private banking – measures to ensure sustainable growth

- Organic build vs. acquisitions
- Onshore and offshore strategies
- Expanding the product offering

Pierre de Weck, Member of the Group Executive Committee,  
Deutsche Bank AG and Global Head of Private Wealth  
Management

11.30

#### Podium discussion

#### The future of private banking – the bigger the better?

Moderator:

Edward Taylor, Journalist Banking,  
The Wall Street Journal Europe, Frankfurt am Main

Participants:

Javier Arús, Managing Director,  
Banco Santander (Suisse) S.A., Geneva

Boris F.J. Collardi, Chief Operating Officer Private Banking,  
Bank Julius Baer & Co. Ltd., Zurich

Dr. Pierre de Weck, Member of the Group Executive Committee,  
Deutsche Bank, London

Sarah Owen-Jones, Chief Risk Officer Coutts International,  
Coutts Bank von Ernst Ltd, Zurich

Serge Robin, CEO and General Manager,  
Merrill Lynch Bank (Suisse) S.A., Geneva

12.15

#### Questions/discussion

12.30

Lunch

ERI Bancaire SA cordially invites you to the lunch.



Tuesday, 4th September 2007

## CONQUERING (NEW) MARKETS

14.00

### Hungry for (new) markets – BNP Paribas

- Why is growth compulsory for PB business?
- Which (and where) are our geographical competitive strengths?
- What types of approaches can we choose in different markets?

**Patrick du Saint**, Head of Private Banking, BNP Paribas (Suisse) SA, Geneva

14.30

### Reaching out for new geographical markets! Barclays private banking

- Identifying key markets
- Nuances of onshore vs. offshore markets
- Leveraging the family silver

**Gerard Aquilina**, Managing Director and Head of Barclays International Private Bank, Barclays Wealth, Barclays PLC, London

15.00

### Questions/discussion

15.15

Coffee break

15.45

### Private banking in the Americas – North and South, new markets are emerging

- The growth of the onshore market in South America
- The US represents an emerging market for wealth management
- The opportunity for collaboration between North and South America to best serve evolving client needs: the Credit Suisse approach

**Anthony DeChellis**, Head of Private Banking Americas, Credit Suisse, New York

16.15

### The strategic role of Asia for Swiss private banks and possible lessons for China

- Product pushing vs. Swiss private banking
- Opportunities for niche players
- What role can Bank Sarasin play in Asia?
- Wealth management industry in China – impact for Swiss banks
- Recommendations and possible future role of Swiss private banks in China

**Fidelis M. Goetz**, Head of Division International and Member of Group Executive Committee, Bank Sarasin & Cie AG, Basel

16.45

### Questions/discussion

17.00

### Podium discussion:

#### Conquering new markets: go onshore or offshore?

Moderator:

**Edward Taylor**

Participants:

**Gerard Aquilina**

**Anthony DeChellis**

**Patrick du Saint**

**Fidelis M. Goetz**

17.45

### Summary and conclusion of the first conference day, followed by a networking reception

Euroforum invites you to the reception at the conclusion of the conference day. Take advantage of the opportunity to compare experiences with speakers and delegates.

18.30

Welcome reception, followed by a gala dinner in the «Zunfthaus zur Meisen», Münsterhof 20, 8001 Zürich. Gala Dinner hosted by HP.



Wednesday, 5th September 2007

8.30

Reception with coffee, tea and croissants

9.00

#### Chairman's introduction and overview

Prof. Bernard Dumas, Swiss Finance Institute, University of Lausanne

### NICHE MARKET STRATEGIES

9.15

#### Building wealth for generations – how to gain a competitive edge in the market

- Business philosophy Bank Frey & Co. AG
  - How Bank Frey creates a competitive advantage in the market
  - How to become an innovator in private banking
- Gregor Bienz, Chief Executive Officer, Bank Frey & Co. AG, Zurich

9.45

#### The art of private wealth management at Berenberg bank

- How one of the oldest private banks in the world differentiates itself from competition
  - Recruitment of private bankers: personality and character are more important than assets
  - Why it is important to service clients with a holistic advisory approach
- Andreas Brodtmann, Partner and Member of the Executive Board, Berenberg Bank, Hamburg

10.15

#### Institutional investment management for private clients

- Corporate view as a foundation
  - Investment management approach
  - Consequences within the implementation
- Matthias Frisch, Chief Executive Officer, Horizon21 Wealth Management, Pfaeffikon

10.45

#### Questions/discussion

11.00

Coffee break

### KEYNOTES ASSET MANAGEMENT IN UPHEAVAL

11.30

#### Keynote speech

#### Asset management – organisational options

- How does a global business balance the trend towards boutiques with the benefits of a large organisation?
- How can asset managers respond to the increasing demand for complex products?

John A. Fraser, Chairman and CEO UBS Global Asset Management and Member of the UBS Group Executive Board, London

12.00

#### Keynote speech

#### The future of global asset management – strategic issues and answers

Robert Parker, Vice Chairman Asset Management, Credit Suisse, London

12.30

#### Questions/discussion

12.45

Lunch

ERI Bancaire SA cordially invites you to the lunch.



Wednesday, 5th September 2007

## STRATEGIC ISSUES

14.15

### Intesa private banking – a new business model in the Italian private banking industry

Dr. Saverio Perissinotto, Deputy Managing Director Intesa Private Banking, Intesa Sanpaolo Group, Milan

14.45

### Perspectives on the private banking industry

- Attractive industry fundamentals
- Preparing for a downturn
- Broad growth strategies and their risks
- Shortcomings of current value propositions

Dr. Felix Wenger, Partner, McKinsey & Company, Inc. Switzerland, Zurich

15.15

### Strategic empowerment – the leverage for sustainable growth

- Empowerment: private bankers as CEOs of their business
  - Participation and ownership: EFG's CRO model
  - Results and sustainability
  - Scalability in diversity
- Eftychia (La) Fischer, Member of the Executive Committee, EFG International, Zurich

15.45

### Questions/discussion

16.00

Coffee break

16.30

### Keynote speech

#### How to manage a global private bank

Chris M Meares, CEO Group Private Banking, HSBC Holdings plc., London

17.00

### The value of a private bank – strategic considerations and pitfalls

- What makes a private bank valuable and for whom?
- Will onshore private banks really take off and is it worth the investment to create them?
- Why many players will fail strategically and exit
- Why markets save the banks and why they will bring some down in the next downturn

Ray Soudah, Founder and CEO, MilleniumAssociates AG, Zug

17.30

### Questions/discussion

17.45

Summary and conclusion of the second conference day, followed by a networking reception  
EUROFORUM invites you to the reception at the conclusion of the conference day. Take advantage of the opportunity to compare experiences with speakers and delegates.

## Post-Conference Day

# FAMILY OFFICE

*Without private clients there is no business. So this year's Family Office day will look at the Family Office industry from the client's point of view.*

The wealth management market continues to expand. In the USA alone 2007 data shows that the number of households with USD 5 million or more to invest has grown by almost 50% since 2003. The Asian wealth market is estimated to be soaring faster still.

But the «knowledge gap» between what clients really want and what providers offer means that many wealth managers will not benefit. Here are two examples:

- A 2005 IBM survey found that wealth managers often fail to develop appropriate products and services because they do not anticipate clients' needs and interests.
- Many private bankers claim that clients are not price sensitive «if you deliver the right service». But they contradicted this in a 2007 poll – with 75% stating that fees are important and 23% adding that they have to discount to win business.

Asset protection is a key issue for our clients. Relationship protection is fundamental to success in our business.

To help delegates form the strategies that will win more business, speakers will share their understanding of what private clients really want: from the business model that serves them best to the importance of fairness in maintaining relationships; from managing relationships between professional advisers to the professionals' role in successfully developing the family's wealth as well as their philanthropy.

### The post-conference day addresses the following topics:

- What clients really want and what providers offer
- The 21st century adviser – a fresh perspective
- Safeguarding the hopes and resolving the fears of the ultra wealthy
- Special guest speaker: Ludwig Forrest, King Baudouin Foundation

Knowledge partner for the post-conference day:  
Key Trust Company Ltd, Jersey

## Thursday, 6th September 2007

8.30

Reception with coffee, tea and croissants  
Distribution of conference documentation

9.00

### Chairman's introduction and overview

**Nicholas Dale**, Member of the Enlarged Executive Committee,  
HSBC Guyerzeller Bank Ltd, Zurich

9.15

### Taking the client's perspective – what private clients really want

- The process for selecting a wealth manager
- How to ensure success stories
- The voice of the client – how to hear it
- Changing words into actions
- Creating a sustainable relationship

**Sebastian Dovey**, Founding Director and Managing Partner,  
Scorpio Partnership Ltd, London

9.45

### The 21st century adviser – a fresh perspective

**Martyn Gowar**, Consultant Tax & Private Capital, Lawrence  
Graham LLP, London

10.15

### Questions/discussion

10.30

Coffee break

11.00

### Treating customers fairly – strategic threat or opportunity?

- What are the key components for successful delivery in financial services?
- What is the threat for private bankers?
- What new capabilities will be required in order to succeed?

**Richard Wyatt-Haines**, MBA, FCIB, MIMC, Chartered Marketer  
and Leadership Fellow of the University of Exeter

Thursday, 6th September 2007

11.30

**The importance of understanding family dynamics**

- Why inevitable conflicts arise
- How to predict trouble ahead
- How to ensure that the family is a positive aspect not a negative

Peter Leach, Partner, BDO Stoy Hayward LLP, London

12.00

**Questions/discussion**

12.15

**Podium discussion**

**What clients really want and what providers offer**

Moderator:

Nicholas Dale

Participants:

Sebastian Dovey

Martyn Gowar

Peter Leach

Richard Wyatt-Haines

12.45

Lunch

14.00

**Produce or service? Finding the balance**

Michael Maslinski, Director, Maslinski & Co Ltd, London

14.30

**Safeguarding the hopes and resolving the fears of the ultra wealthy**

Jeremy Arnold, Managing Director and Head of Wealth Advisory at Barclays Wealth, Barclays PLC, London

Olivier Zucker, Director, Private Bank at Barclays Wealth, Barclays PLC, London

15.15

**Questions/discussion**

15.30

Coffee break

16.00

**Why we set up a family office and how it works with other professionals**

Penny Lovell, Group Head of Business Development, Fleming Family & Partners, London

16.30

**Special guest speaker**

**Families and philanthropy: maximizing the impact of giving**

- Diversity and opportunities in philanthropy
  - Impact driven donations
  - How to proceed?
  - Important (cross-border) tax issues
- Ludwig Forrest, Project Manager, King Baudouin Foundation, Brussels

17.00

**Questions/discussion**

17.15

Summary and conference close

### Reasons why you do not want to miss this conference

1. Participate in discussions with major players in the Swiss and the international private banking scene.
2. The development of fresh sources of income is the key success factor in private banking. Get hands-on, practically-oriented information and discuss new opportunities for growth with top management executives.
3. Make use of an extensive networking platform to gather information and inspiration that will benefit your own business.

With a market share of 35% Switzerland's wealth managers are the world leaders in the off-shore asset management business. This conference provides a first-class opportunity to meet and exchange strategic ideas with the experts.

### Who should attend this conference?

From Private Banks and Family Offices:

- Chairmen
- Chief Executive Officers
- Managing Partners and Managing Directors
- Chief Investment Officers
- Head of International Private Banking
- Heads of Asset Management
- Heads of Business Development
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## Knowledge partner of the post-conference day



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## Exhibitors

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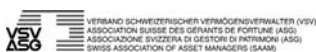
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## 6th PRIVATE BANKING SUMMIT/FAMILY OFFICE

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### QUESTIONS / CONTACT

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