

7th PRIVATE BANKING SUMMIT

NAVIGATING THROUGH TURBULENT TIMES

2nd to 4th September 2008 | Renaissance Zurich Hotel, Zurich-Glattpark

KEYNOTE SPEAKERS



DR. EUGEN HALTINER,
Chairman, Swiss Federal
Banking Commission,
Berne



CHRIS M. MEARES,
CEO Group Private Banking,
HSBC Group, London



JOACHIM H. STRAEHLE,
CEO Bank Sarasin & Cie AG,
Basel



RAOUL WEIL,
Chairman and CEO Global
Wealth Management & Business
Banking, UBS, Zurich

CONFIRMED SPEAKERS AND PANELISTS



DR. THOMAS BAECHTOLD,
Executive Vice President,
Pictet Family Office,
Pictet & Cie., Zurich



ANNE-MARIE DE WECK,
Managing Partner, Lombard
Odier Darier Hentsch & Cie,
Geneva



MARK EVANS,
Head of Family Business
and Philanthropy,
Coutts & Co, London



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



L. JACK STALEY, President of
Stanford Group (Suisse) AG and
Head of the European region for
Stanford Zurich, Zurich



PETER VERBAAS,
Managing Director
International Private
Banking, Van Lanschot
Bankiers S.A., Utrecht

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ROYAL BANK OF SCOTLAND, ZURICH
SAXO BANK A/S, HELLERUP
SWITZERBANK.COM, ZURICH

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DAVID BAIN, Financial News, Dow Jones, London
BRIGITTE STREBEL, Independent Financial Editor
and Consultant, Wettswil

CHAIRMAN

PROF. TEODORO D. COCCA
Johannes Kepler University, Linz

POST-CONFERENCE DAY

4th September 2008

TRUSTS

CONFIRMED SPEAKERS AND PANELISTS

KONRAD K. HAEUPTLI, CEO,
HSBC Guyerzeller Trust Company AG, Zurich

NICHOLAS JACOB, Partner,
Lawrence Graham LLP, London

DR. DANIEL LEHMANN, Associate,
Shearman & Sterling LLP, Mannheim

DR. HUBERTUS LUDWIG, Partner,
VISCHER Attorneys at Law, Basel

PHILIP MARCOVICI, Partner,
Baker & McKenzie, Zurich

JEAN-MARC TIRARD, Partner,
Tirard Naudin société d'avocats, Paris

DR. NEDIM PETER VOGT, Partner and
Head of Private Clients, Baer & Karrer, Zurich

CHAIRMAN

TIM URQUHART
Chairman, STEP Switzerland and
Liechtenstein Branch, Zurich

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NAVIGATING THROUGH TURBULENT TIMES

A matter of trust

Yesterday a goldilocks environment and record profits, today one of the worst crises in decades. Starting with the involvement of Wall Street investment banking in the US mortgage sector, the global banking industry has since been undergoing an extremely rocky time.

The Private Banking sector might be one of the more stable units within the business. Nonetheless the challenges have mounted rapidly even there: when financial markets turn shaky, unstable business models and unwisely constructed and intransparent financial products are unmasked and clients increasingly ask tough questions. The volatile financial markets and a weak dollar put profitability under pressure. But that is not everything: Mistrust among the banks, long thought a phenomenon of the past, has resurged. Following this, clients' trust in their bank has, in some cases, been shaken. Data problems relating to the activities of both the German tax authorities and the German secret service do not help and raise, in turn, questions of trust between the banks and their employees.

What are the answers on a strategic and management level? How can the challenges be turned into long term success factors? Take the opportunity to discuss these topics with international leaders from the Private Banking Business, Swiss regulatory authorities, top lawyers and consultants. The post conference day also puts the spotlight on the instrument trust, an up and coming feature within the continental European Private Banking landscape.

We cordially invite you to join our Private Banking Summit 2008.

Yours sincerely



Claudia Gabriel
Editor-in-Chief, Schweizer Bank



François Schaller
Editor-in-Chief, Private Banking

Agenda PRIVATE BANKING SUMMIT 2008

- The relevance of traditional values in the private banking industry
- Sustainability: niche or mega trend?
- Client-centricity
- On- and offshore strategies
- Positioning in global markets
- Expansion vs. consolidation in private banking
- Differentiation in private banking

Agenda Post-Conference Day TRUSTS

- Relevance of trusts for family offices in Switzerland and the European context
- Trust planning
- Different legislative approaches
- Open questions concerning the fiscal aspects
- Various consequences of different solutions

Panelists, Speakers and Chair



Dr. Thomas Baechtold, Executive Vice President, Pictet Family Office, Pictet & Cie., Zurich



David Bain, Financial News, Dow Jones, London



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



Jean Pierre Cuoni, Chairman of the Board, EFG International, Zurich



Anne-Marie de Weck, Managing Partner, Lombard Odier Darier Hentsch & Cie, Geneva



Mark Evans, Head of Family Business and Philanthropy, Coutts & Co, London



Dr. Eugen Haltiner, Chairman, Swiss Federal Banking Commission, Berne



Konrad K. Haeuptli, CEO, HSBC Guyerzeller Trust Company AG, Zurich



Daniel Isler, Managing Partner, Switzerbank.com, Zurich



Nicholas Jacob, Partner, Lawrence Graham LLP, London



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



Brigitte Strebel, Brigitte Strebel GmbH, Independent Financial Editor and Consultant, Wettswil



Dr. Rolf P. Jetzer, Member of the Boards, Julius Baer Holding Ltd. and Bank Julius Baer & Co. Ltd., Zurich



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



Jean-Marc Tirard, Partner, Tirard Naudin société d'avocats, Paris



Michael Kullmann, Partner, MSR Consulting, Cologne



Dr. Juergen Pulm, Chief Operating Officer, Royal Bank of Scotland, Zurich



Tim Urquhart, Chairman, STEP Switzerland and Liechtenstein Branch, Zurich



Dr. Daniel Lehmann, Associate, Shearman & Sterling LLP, Mannheim



Dr. Leo Thomas Schrutt, Head of Wealth Management & Investment, Stanford Group (Suisse) AG, Zurich



Peter Verbaas, Managing Director International Private Banking, Van Lanschot Bankiers S.A., Utrecht



Adrian Leuenberger, Member of the Executive Board, Clariden Leu Ltd., Zurich



Kurt Spirig, Member of the General Management, B-Source, Lugano



Dr. Nedim Peter Vogt, Partner and Head of Private Clients, Baer & Karrer, Zurich



Jean-Louis Lovisa, Executive Vice President, Head of Private Banking Bank SYZ & CO AG, Zurich



Tilmann Spohr, Chief Client Officer and Managing Director, Bank Sarasin & Cie AG, Zurich



Raoul Weil, Chairman and CEO Global Wealth Management & Business Banking, UBS, Zurich



Dr. Hubertus Ludwig, Partner, VISCHER Attorneys at Law, Basel



L. Jack Staley, President of Stanford Group (Suisse) AG and Head of the European region for Stanford Zurich, Zurich



Jacob Wester, Director, Head of Private Wealth Management (Europe), Saxo Bank A/S, Hellerup



Philip Marcovici, Partner, Baker & McKenzie, Zurich



Joachim H. Straehle, CEO Bank Sarasin & Cie AG, Basel

For more detailed information about speakers, panelists and chairmen please visit www.private-banking-summit.com

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Tuesday, 2nd September 2008

8.30

Reception with coffee, tea and croissants
Distribution of conference documentation

9.00

Welcome and introduction of the conference theme

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

AN OUTLOOK

9.30

The outlook for global capital markets and the implication for the private banking industry

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

LONG TERM SUCCESS FACTORS

10.00

The importance of traditional values in private wealth management

- Tradition, quality and autonomy are the most important elements of a sustainable identity – internally and externally
- How to evaluate, develop and maintain those valuable elements?

Dr. Rolf P. Jetzer, Member of the Boards, Julius Baer Holding Ltd. and Bank Julius Baer & Co Ltd., Zurich

10.30

Questions/discussion

10.45

Break (coffee and tea)

11.15

Client-centricity in private banking – buzzword or of economic interest

- Rationale to put the client into the center of private banking and how we define a client-centric management approach
- How does a systematic client-centricity-program look like?
- Learnings at Bank Sarasin and indicators of success

Michael Kullmann, Partner, MSR Consulting, Cologne and
Tilman Spohr, Chief Client Officer and Managing Director, Bank Sarasin & Cie AG, Zurich

11.45

Keynote

About the challenges and the role of a watchdog

- The recent turbulences in the financial markets question the capabilities of a supervisory authority
- FINMA, the Swiss answer, will become an integrated supervisor
- Can FINMA meet the expectations?
- What is the mandate and what are the credentials of a watchdog?

Dr. Eugen Haltiner, Chairman, Swiss Federal Banking Commission, Berne

12.15

Questions/discussion

12.30

Lunch

ERI Bancaire SA cordially invites you to the lunch.



INTERNATIONAL COMPETITIVENESS

14.00

Conquering markets with a new business model

- Opportunities
- The EFG model
- Tracking performance
- Results and outlook

Jean Pierre Cuoni, Chairman of the Board, EFG International, Zurich

14.30

Keynote

How to improve the cost-income ratio in a global private bank?

- Managing the revenue side
- Managing the cost side
- Achieving long-term improvements

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

15.00

Questions/discussion

15.15

Break (coffee and tea)

Tuesday, 2nd September 2008

15.45

Modern and independent wealth management

- New players, new schemes in the private banking industry
- How to combine online private banking with the traditional way of private banking

Jacob Wester, Director, Head of Private Wealth Management (Europe), Saxo Bank A/S, Hellerup

16.15

Positioning in a global market

- Critical mass: The importance of size in the global competition for market share
- Consolidation: From planning to realization: The first 500 days of Clariden Leu, case study
- Attractive opportunities for growth

Adrian Leuenberger, Member of the Executive Board, Clariden Leu Ltd., Zurich

16.45

Questions/discussion

17.00

Panel discussion**The challenges for the private banking industry in an economic downturn****Moderation:**

David Bain, Financial News, Dow Jones, London

Participants:

Adrian Leuenberger

Robert Parker

Dr. Juergen Plum, COO Royal Bank of Scotland, Zurich

Kurt Spirig, Member of the General Management,

B-Source, Lugano

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.

Albert Reichmuth Inc invites you to a wine-tasting

19.15

Welcome reception for the gala dinner
Hewlett-Packard invites you to the Gala Dinner at
The Dolder Grand, Kurhausstrasse 65, 8032 Zurich



Wednesday, 3rd September 2008

8.30

Reception with coffee, tea and croissants

9.00

Welcome and introduction

Prof. Teodoro D. Cocca

NICHE MARKET STRATEGIES

9.15

Wealth management – more than just financial matter

- What do wealthy clients care about?
 - How can a company differentiate itself?
 - Trends in social responsibility/philanthropy
- L. Jack Staley**, President of Stanford Group (Suisse) AG and head of the European region for Stanford Zurich, Zurich

9.45

The art of private wealth management at F. van Lanschot Bankiers – how one of the eldest private banks in the world differentiates itself from competition

- Overview and control of your wealth
 - Boutique funds as an essential part of the investment portfolio
 - How do we achieve absolute return?
 - Recent developments in the Dutch wealth management market and the rise of the family office industry in the Netherlands, a banker's response
- Peter Verbaas**, Managing Director international Private Banking, Van Lanschot Bankiers S.A., Utrecht

10.15

Questions/discussion

10.30

Break (coffee and tea)

11.00

Keynote**Sustainability: niche or mega trend?**

- Successful companies and how carefully they handle resources and how quickly they adapt to environmental and social changes
- Growing interest in sustainable investments
- Sustainable investments – one of Bank Sarasin's key competencies

Joachim H. Straehle, CEO Bank Sarasin & Cie AG, Basel

Wednesday, 3rd September 2008

11.30

Focus on performance: What impact on the way private banks work?

- Better informed clients and increased competition from other financial centres put more pressure on Swiss private banks to deliver investments performance
- New focus on performance significantly changes the way banks manage their clients portfolios
- After long years of quantitative-based investment strategies, will we finally see a trend towards a more humanist style of portfolio management?
- A key issue: to avoid conflicts between the interests of the clients and the short term interests of the shareholders

Jean-Louis Lovisa, Executive Vice President, Head of Private Banking, Bank SYZ & CO AG, Zurich

12.00

A differentiated approach to achieve sustainable results

Anne-Marie de Weck, Managing Partner, Lombard Odier Darier Hentsch & Cie, Geneva

12.30

Questions/discussion

12.45

Lunch

ERI Bancaire SA cordially invites you to the lunch



FAMILY OFFICE

14.15

Why wealthy families choose to have a family office

- Why the traditional private banking offer does not always fulfill nowadays needs of ultra high net worth
- How wealthy families want their assets to be managed
- New trends and the future in the family office offering

Dr. Thomas Baechtold, Executive Vice President, Pictet Family Office, Pictet & Cie., Zurich

14.45

Starting the philanthropy conversation with clients

- Common excuses for not talking about philanthropy
- Reasons for getting the philanthropy discussion going
- Giving the right advice

Mark Evans, Head of Family Business and Philanthropy, Coutts & Co, London

15.15

Questions/discussion

15.30

Break (coffee and tea)

INDUSTRY TRENDS

16.00

Keynote

Wealth management: Industry trends and outlook

- Short- and long-term trends of the industry
- Client needs and alignment of service and product offering
- Successful wealth manager business models

Raoul Weil, Chairman and CEO Global Wealth Management & Business Banking, UBS, Zurich

16.30

Client acquisition via Internet

- Enable the client to select his relationship manager
- Matchmaking based on interpersonal liking
- Video portraits of relationship managers
- Innovative and effective offshore marketing

Daniel Isler, Managing Partner, Switzerbank.com, Zurich

17.00

Questions/discussion

17.15

Panel discussion

The future of private banking – a matter of trust

Moderation:

Brigitte Strebel, Brigitte Strebel GmbH, Independent Financial Editor and Consultant, Wettswil

Participants:

Dr. Leo Thomas Schruttt, Head of Wealth Management & Investments, Stanford Group (Suisse) AG, Zurich

Joachim H. Straehle

Peter Verbaas

18.00

Summary and conclusion of the second conference day

Albert Reichmuth Inc invites you to a wine-tasting

Thursday, 4th September 2008

Post-Conference Day

TRUSTS

Switzerland ratified the Hague Trust Convention with an eye to the growing importance of the trust business. A large volume of assets belonging to trusts, or managed in the name of trusts, is held in Switzerland. Therefore, trusts play an important role in the private banking business, especially for family offices. More and more banks have their own trust departments. The post-conference day is devoted to examining the relevance of trusts for family offices in Switzerland and the European context. Experts from countries representing a range of legislative approaches will speak and discuss the issues.

The legal recognition of trusts leads to greater legal security and clarity. But in Switzerland there are still some open questions, especially concerning the fiscal aspects. Another focus of the post-conference day will highlight the various consequences of different solutions. Explore practical examples of the successful strategies of family bankers and lawyers and exchange ideas with top executives.

Knowledge partner:
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The Society of Trust and estate Practitioners (STEP) is the professional body for the trust and estate professions worldwide and currently has over 13'000 members and students.

STEP was founded in 1991 to meet the recognised need for a medium by which trust and estate practitioners could readily communicate with each other and at the same time be identified as a senior practitioners, highly qualified to provide advice in this specialised field. The clear need for such a body is reflected in the steadily growing membership and expanding number of jurisdictions covered. The key to STEP's success lies in its network of branches. All branches are run by voluntary committees and are responsible for their own educational and social activities.

8.30

Reception with coffee, tea and croissants
Distribution of conference documentation

9.00

Welcome and introduction of the conference theme

Tim Urquhart, Chairman, STEP Switzerland and Liechtenstein Branch, Zurich

TRUST PLANNING

9.30

Trust planning for very wealthy clients

- Jigsaw of family governance such as constitutions, private trust companies and the avoidance of family disputes

Nicholas Jacob, Partner, Lawrence Graham LLP, London

10.00

Structuring trust portfolios from a private bank view

Konrad K. Haeuptli, CEO, HSBC Guyerzeller Trust Company AG, Zurich

10.30

Questions/discussion

10.45

Break (coffee and tea)

TRUSTS AND SWISS LAW

11.15

Trusts and Swiss law – understanding the impact of the Hague Convention

- Avoiding trust litigation from a (Swiss) civil law perspective
- Prenuptial agreements
- Divorce law issues effecting trusts
- Matrimonial property law issues
- Forced heirship issues
- Civil law rules against perpetuities

Dr. Nedim Peter Vogt, Partner and Head of Private Clients, Baer & Karrer, Zurich

Thursday, 4th September 2008

11.45

Taxation of trusts in Switzerland

- Trust as a tax entity
 - The concept of taxation according to the SSK circular letter of August 22, 2007
 - Irrevocable/revocable trust – the decisive issue
 - The taxation of the irrevocable discretionary trust separates Switzerland
- Dr. Hubertus Ludwig, Partner, VISCHER Attorneys at law, Basel

12.15

Questions/discussion

12.30

Lunch

CONQUERING MARKETS

14.00

Terra incognita – trusts in Germany

- Conflicts between civil law and trusts
 - Tax environment for trusts in Germany
 - How to prepare for the worst
- Dr. Daniel Lehmann, Associate, Shearman & Sterling LLP, Mannheim

14.30

Trusts in France

- The favorable treatment of trusts in the French courts
 - The tax treatments of trusts vis-à-vis income tax, wealth tax and inheritance and gift tax
 - In which circumstances is it appropriate to use a trust with French connections?
- Jean-Marc Tirard, Partner, Tirard Naudin société d'avocats, Paris

15.00

Questions/discussion

15.15

Break (coffee and tea)

15.45

Trusts and the needs of families with Asian connections

- Planning issues and the use of trust in Asia
 - Hong Kong and Singapore, and the latent trust needs of families
 - Mobility planning and the special long term role of Asia
 - Greater China: Understanding the differing needs of wealth owners in Hong Kong, China and Taiwan, and the role of trusts
 - Strategic development of trust business from Asia connected wealth owners
- Philip Marcovici, Partner, Baker & McKenzie, Zurich

16.15

Questions/discussion

16.30

Panel discussion

Industry forecast – bright or cloudy?

Moderation:

Tim Urquhart

Participants:

Konrad K. Haeuptli

Nicholas Jacob

Philip Marcovici

Jean-Marc Tirard

17.15

Summary and conclusion of the post-conference day, followed by a networking reception
Renaissance Zurich hotel invites you to the reception at the conclusion of the post-conference day. Take advantage of the opportunity to compare experiences with speakers and delegates

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Host of the lunches



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Host of the gala dinner



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Exhibitor



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Private Banking

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Schweizer Bank

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