

Hotel Splendide Royal - Lugano

Program

Session 1 **Wednesday 3rd December 2003** **09h00 - 12h00**

- 09h00-10h00 Welcome coffee – Registrations
- 10h00-10h30 “ Macroeconomic and Regulatory Trends and their consequences for Private Banking and Asset Management”
René Kästli, Member of the Swiss Federal Banking Commission, (Zürich) (E)
- 10h30-11h00 “Trends in Asset and Wealth Management”
Sergio Focardi, Partner, The Intertek Group (Paris): Findings of the Study “Evolving Business Models in Asset and Private Wealth Management” commissioned from the Intertek Group for the Event (E)
- 11h00-11h30 Coffee-Break & Networking
- 11h30-12h00 “Open Architecture solutions for Private Banks”
Shamindra Perera, Director for Funds distribution, Frank Russell Company, (London)(E)
- 12h00-13h30 Business Lunch

Session 2 **Wednesday 3rd December 2003** **14h00 - 16h00**

- 14h00-14h30 “Free Cash Flow: The Key to Successful Value Investing”
Michael Feldman, Executive Vice President, Private Capital Management, (Florida USA)(E)
- 14h30-15h00 “Where is the market going? Fund fees and Assets Analysis”
Ed Moisson, Associate, Communications, Fitzrovia International plc, (London)(E)
- 15h00-15h30 Coffee-Break & Networking
- 15h30-16h00 “Ucits III Directive and the European market of mutual investment funds and investment services”
Massimo Trentino, Partner, McDermott, Will & Emery / Carnelutti Studio Legale Associato, (Rome) (E)
- From 18h30 Cocktail and Dinner

Session 1 Thursday 4th December 2003 09h00 - 12h00

- 09h00-09h30 “Growth & Inflation: near-term prospects and longer-term trends”
Jean-Philippe Cotis, Chief Economist OECD, (Paris)(E)
- 09h30-10h00 “Fads and Myths in Investment Management: Some (almost)
historical Remarks”
*Erwin Heri, Chairman of OZ Bankers AG and Professor of Finance at
the University of Basle (E)*
- 10h00-10h30 Coffee-Break & Networking
- 10h30-11h00 “New Paradigm in Asset Management” *Bruno P. Müller,
Promco SA, Geneva (E)*
- 11h00-11h30 “Growing importance of the Onshore Business”
*Luca Soncini, Member of Executive Board, Head of Group Corporate
Center, Banca del Gottardo, (Lugano)(I)*
- 11h30-12h00 “Quale modello distributivo adottato nel private banking?”
*Giuseppe Marsi, Executive Director, Private Banking Schroder
Investment Management (Italy) Sim SpA (I)*
- From 12h00 Business Lunch and Forum closing