

Quarterly Review

Q3 2025 Edition

Dear CFA Society Switzerland Community,

In Q3 2025, we hosted a vibrant mix of events advancing professional development, networking, and thought leadership. Career-focused events included **Career Paths**, exploring private market trends and mental resilience, and targeted **Soft Skills Workshops** on confident presentations and mastering job interviews. Networking was strengthened through after-work drinks across major Swiss cities, while the ESG discussion in August provided institutional insights into sustainable investing. Conferences such as the **Swiss Pensions Conference** and **Generations Conference** highlighted innovation, market opportunities, and intergenerational perspectives, alongside **Candidate-focused sessions** offering practical guidance on career progression and CFA exam preparation. Additionally, we contributed to the **8th Private Markets Research Conference**, emphasizing strategic asset allocation and democratization of private market instruments.

We count...

3,300+

Members

1700+

Candidates

250+

Volunteers

17

Events (Q2)

02

Webinars (Q2)

15

In-Person Events (Q2)

Annual General Meeting

On 30 September, we held our yearly AGM. Our members approved the financials 2024/25 and the new bylaws, exonerated the Board of Directors and re-elected the Members of the Board of Directors. We welcome Sunny Karkhanis, CFA, as our new president and Olivier P. Müller, CFA, as our new vice-president.

In-Person Events

Peak ESG oder neuer Nachhaltigkeitsansatz?

On 27 August, experienced experts from pension funds, foundations, and asset management discussed practical opportunities and challenges of ESG from the perspective of institutional investors. The event offered a balanced view of the future of sustainable investments.



Career Paths

On 24 September, our Careers Committee hosted an inspiring evening focused on career development and personal resilience. The event featured two engaging panels: the first explored career opportunities and trends in private markets, highlighting industry growth, challenges, and the skills needed to succeed; the second emphasised the importance of mental fitness, sharing strategies to optimize focus, manage stress, and perform at best under pressure.

Supported by our sponsor, Partners Group, the evening highlighted exciting career opportunities in the Swiss financial landscape and the resilience required to thrive in a rapidly evolving environment.



8th Private Markets Research Conference

CFA Society Switzerland proudly contributed to the 8th Private Markets Research Conference in Lausanne on 26–27 June, organizing two panels: “Private Equity’s Role in Strategic Asset Allocation under Shifting Monetary Dynamics” and “Democratisation of Private Market Instruments.” Both highlighted the ongoing transformation of private markets—from institutional-only investments to broader accessibility—while emphasizing the need to balance innovation with prudent risk management in today’s unique monetary environment.



After Work Drinks

Starting again in September, our series of after-work drinks took place across Zurich, Bern, Basel, Lausanne, Geneva, and Lugano. These events provided a relaxed yet engaging environment for members to network, share insights, and strengthen professional connections. The series was proudly sponsored by Quaero Capital, with Wellington Management joining as co-sponsor for the Zurich After-Work Drinks. Thank you to our sponsors BCV for sponsoring our After Work Drinks in Lausanne.



Conferences

Swiss Pensions Conference Zurich - Investing in a Polarised World

On 19 June, Swiss pension professionals joined us at the Dolder Grand for the annual Swiss Pensions Conference Zurich.

At this year's Swiss Pensions Conference, Howard Marks, Co-Chairman, Oaktree Capital Management, opened with insights on market cycles, risk, and investing in a polarized environment. A CIO panel from Swiss and Dutch pension funds examined infrastructure's role in delivering long-term, stable returns. Eveline Takken-Somers, Deputy Head in the CILI team and the Lead Portfolio Manager of the Insurance portfolio, reviewed insurance-linked investments as a diversification and volatility hedge. In a "Joker Session," Dr. Thomas Zurbuchen, Head of ETH Zürich | Space, shared lessons on resilience and decision-making under uncertainty. Christoph Heusgen, Chairman of the Munich Security Conference from 2022 to 2025, closed with a geopolitical outlook. Across the day, discussions addressed inflation, regional dynamics, and advances in technology and sustainability.

It was an energising, well-attended day that left participants inspired and better equipped for the road ahead.





Generations Conference - Strong Roots, Bold Moves: Bridging Legacy and Innovation

On 22 September, we hosted our flagship Generations Conference 2025 at the Dolder Grand. Carl Elsener, CEO & Chairman, Victorinox, delivered a brilliant opening keynote on building a global brand from heritage and innovation, followed by Prof. Dr. Thomas Zellweger, Professor, HSG, on Transgenerational Entrepreneurship: The Science of Family Success. A Single Family Office Investment Panel tackled Navigating Uncertainty, while other sessions explored how AI is reshaping drug development and spotlighted forward-looking opportunities from convertible bonds to EM small-cap equities. The Future-Fit Private Wealth panel—Frédéric Hoffmann, President, Uearthodox, and Andrea La Mesa, Co-CEO, The Life You Can Save, ex Airbnb, Entrepreneur, Investor moderated by Dr. Falko Paetzold, Founder, Center for Sustainable Finance and Private Wealth (CSP) and CCSP at University of St.Gallen—challenged us to rethink tradition, legacy, and purpose. We closed with Rudolf Hilti, Founding Chair of The System Change Foundation [THE HUS & World Systemic Forum], Founding Board of Re-State Foundation and Ecosystem Builder @RHEINEST Holding, on The Future of Wealth with Purpose, before networking breaks capped a high-energy day of peer exchange.



Workshops

The Art of Confident Presentations - Exclusive Soft Skills Workshop

On 01 July, our Careers Committee hosted the second workshop in the Soft Skills Initiative, designed to equip finance professionals with the interpersonal skills essential for long-term career success.

Led by experienced coach Karen Cody, the interactive session focused on presentation mastery—guiding participants to craft compelling narratives, engage audiences confidently, and manage stress and stage anxiety. Attendees left better equipped to present with clarity, authority, and confidence at every stage of their careers.



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Q3 Webinars

All of our webinars are free of charge and open for everyone to join.

02 September, 12:15 - 13:15: Women in Finance with Seraina Frey

25 September, 12:15 - 13:15: From Vision to Execution: Lessons learnt from Macro Strategy Research Generative AI Journey at Swiss Re with Patrick Saner, Swiss Re.

Candidate Initiatives

How to Succeed in Finance with Dr. Oliver Grimm, CFA

On 02 July, CFA Society Switzerland hosted another insightful session of our "How to Succeed in Finance" series, exclusively for candidate members.

In a candid fireside chat, Dr. Grimm encouraged attendees to:

- Seize opportunities when they arise — don't let them pass by.
- Build and nurture your network early — its importance grows with your career.
- Secure internal support — a critical factor for long-term success.

The session concluded with an engaging Q&A, allowing candidate members to connect directly and gain further perspective.



Passing the CFA Exam - Exclusively for Candidate Members

Our "Passing the CFA Exam" event on 23 September offered valuable guidance from recent charterholders. Key takeaways included approaching Level II as the most challenging stage, giving special attention to Ethics across all levels, experimenting with different study strategies to find what works best, and leaving sufficient time before the exam for mock exams, revision, and filling knowledge gaps to optimize retention.



Thank you!

to our sponsors for your support in making
these great events possible!

Upcoming Events

SAVE THE DATES FOR 2025

Award Ceremony & Annual Dinner

- Award Ceremony & Annual Dinner
- 20.11.25 - Geneva

In-Person

- Lugano Finance Forum: The Private and Public Markets Convergence
- 18.11.25 - Lugano

- Real Estate Fundamentals and Market Cycles: Considerations in Asset Allocation Decisions
- 19.11.25 - Zurich

- Women in Finance Networking Aperero
- 25.11.25 - Zurich

- The Art of Giving and Receiving Feedback – An Exclusive Soft Skills Workshop
- 26.11.25 - Zurich

Webinars

- ESG Considerations in ILS Investing
- 06.11.25

- The Humble Investor
- 11.11.25

- Swiss Wealth Management: Market & Trends
- 13.11.25

- Women in Finance with Emel Can
- 25.11.25

- GenAI for Fundamental Investors
- 27.11.25

Networking Drinks

- 11.11.25 - Zurich
- 12.11.25 - Geneva
- 19.11.25 - Basel
- 03.12.25 - Bern
- 03.12.25 - Lausanne
- 09.12.25 - Zurich Christmas Aperero
- 10.12.25 - Geneva Christmas Drinks
- 17.12.25 - Basel



[See all upcoming events](#)

New LinkedIn Group for the CFA Society Switzerland Career Mentoring Program!

This group is designed to share the benefits of mentorship for both mentors and mentees, provide updates about the program, and offer testimonials, tips, and articles related to mentoring. We welcome current participants and - hopefully - future mentors and mentees. Thank you for following us on our mentoring journey!

Explore the Group here!

Stay Connected with Us on LinkedIn!

Join a growing community of over 12,000 finance professionals and enthusiasts who follow us for the latest industry updates, expert insights, and event highlights.

Follow us today and be part of a vibrant network advancing the future of the investment profession.

Follow us today!

We are always open to new suggestions and your feedback. Do you have an idea for a topic or a speaker? Feel free to send your suggestions to info@cfasocietyswitzerland.org