

A pair of hands, one from a younger person and one from an older person, are cupped together, holding a small, round, silver compass. The compass is positioned in the center of the hands, with its needle pointing towards the top. The background is a rustic, weathered wooden surface with visible grain and some peeling paint. The overall tone is warm and suggests guidance and support across generations.

Generations Conference 2024

#GC24 | NAVIGATING UNCERTAIN TIMES

19 September 2024 | Rüschlikon



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Generations Conference 2024 – Navigating Uncertain Times

Welcome to the 6th Installment of the Generations Conference

Our world is changing at an unprecedented pace, and families dedicated to preserving their wealth face numerous challenges, from geopolitical volatility and climate change to technological advancements. This year's conference is dedicated to maintaining stability amid these uncertainties, leveraging the wisdom of past generations and identifying core values to guide the future.

Our program extends beyond traditional financial topics. Esteemed speakers, including members of successful multi-generational families, distinguished academics, family office CIOs, and leading family office practitioners, will share their insights through keynote speeches and engaging panel discussions.

This event is also an exceptional networking opportunity. Connect with fellow family officers, asset owners, and service providers, forging valuable relationships that will last beyond the conference.

Whether you are part of a single-family office, multi-family office, or a trusted advisor to families, this conference is designed for you. Gain the tools, insights, and connections necessary to navigate the evolving financial landscape. Together, we will explore strategies to enhance performance, mitigate risks, and address the dynamic requirements of wealth preservation in today's ever-changing markets.

Event Details | The annual Generations Conference is an independent, personable forum of education dedicated to the real issues and unique challenges facing asset owners, their businesses, Family Offices (FOs) and Foundations. The Generations Conference 2024 offers a one day program to a select number of principals and professionals working for Family Offices to connect with like-minded thought leaders and peers in the industry and discuss challenges, leading practices and trends.

Location | Swiss Re Center for Global Dialogue, Gheistrasse 37, 8803 Rüschlikon

5 PL Credits | CFA Institute's/CFA Societies' members can record PL credit for their participation using the online tracking tool (CFA Institute login required).

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Agenda | 19 September 2024 #GC24

07:45–8:45	SFO Breakfast (registration by invitation only) Systemic Investing & Polycapital – Discussion on the Key Frontier in the Impact-Debate with Dr. Falko Paetzold , Initiator and Managing Director of the Center for Sustainable Finance and Private Wealth (CSP) at University of Zurich
08:00–08:55	Registration and Refreshments
09:00–09:05	Welcome Address Mirjana Wojtal, PhD , CEO of CFA Society Switzerland Marius Holzer, CFA , Partner at Parkview Group (MFO), Conference Chairman
09:05–10:00	Heritage and Succession: Navigating Generational Legacy at Audemars Piguet Olivier Audemars , Vice Chairman of the Board of Directors
10:00–11:00	Case Study – Systemic Investing & Polycapital – Discussion on the Key Frontier in the Impact-Debate. Case study of the US-based Fink Family Tackling Food-Waste Systemically in the US Dr. Falko Paetzold , Initiator and Managing Director of the Center for Sustainable Finance and Private Wealth (CSP) at University of Zurich Dominic Hofstetter , Executive Director of the TransCap Initiative
11:00–11:30	Networking Break
11:30–12:15	Parallel Session Plenary Room Navigating Income Management: Adapting to Market Volatility Frank Lipowski , Portfolio Manager and Analyst Flossbach von Storch
11:30–12:15	Parallel Session Breakout Room The Impact of GLP-1 Drugs on Obesity, Public Health, and the Economy Dr. Stefan Larson , Venture Partner, Sectoral Asset Management
12:15–12:45	The Swiss Single Family Office Landscape Dr. Kurt Moosmann , SFOA President Felix Oeschger , SFOA Board Member
12:45–14:00	Networking Lunch

14:00-15:00

Family Office CIO Panel

Moderator: Maria Obrecht, CFA, UBS Wealth Management
Philipp Fertig, CFA, Head of Securities, Silence Family Office AG (SFO)
Malgosia van Zyl, CFA, Former Chief Investment Officer at Chenor AG (SFO)
Marc Buchli, Co-CEO and Executive Board Member Flick Family Office & Privatstiftung (SFO)

15:00-15:45

Parallel Session | Plenary Room Financials Credit in an Uncertain Rates Environment

Luca Evangelisti, Investment Manager & Head of Credit Research, Jupiter Asset Management

15:00-15:45

Parallel Session | Breakout Room Listed Small Caps vs Private Equity Mid-Market: A Valuation Mismatch?

Philip Best, Fund Manager, **Marc Saint John Webb**, Fund Manager, **Laurent Stöckli**, Equity Research Analyst at Quaero Capital

15:45-16:15

Networking Break

16:15-16:55

Building and Running a Portfolio of Private Equity and Private Debt Funds

Carl Wieandt, CEO SUSCAP (SFO)

16:55-17:35

The Climate and Biodiversity Nexus: Investing in Nature-Based Solutions

Alexa Firmenich, Investor, Consultant and Facilitator on the Climate Crisis

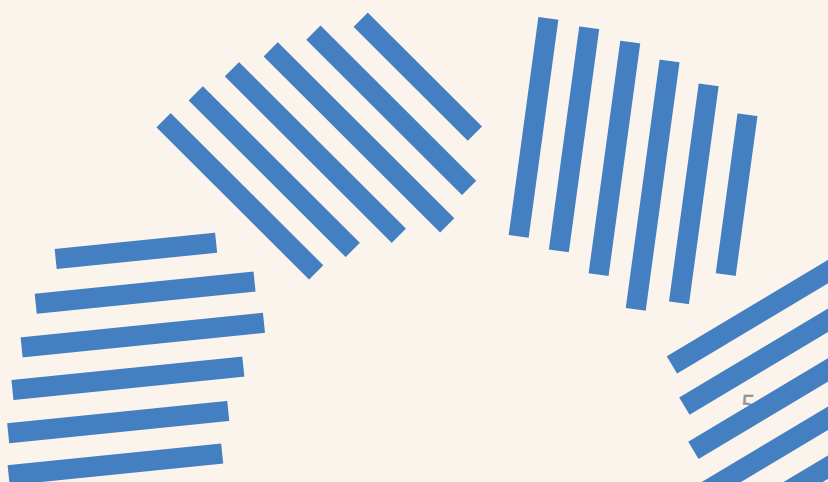
17:35-17:40

Closing Remarks

Marius Holzer, CFA, Partner at Parkview Group (MFO), Conference Chairman

17:40-19:00

Apéro Riche





Olivier Audemars (SFO)

Vice-Chairman of Audemars Piguet's Board of Directors

Olivier Audemars is the great-grandson of Edward Auguste Piguet, co-founder of Audemars Piguet. Raised near Le Brassus, the birthplace of the family business, Olivier was deeply influenced by his grandfather's passion for watchmaking and his commitment to the Vallée de Joux.

Although Olivier pursued a career in materials science, co-founding Qualimatest in 1989, his strong connection to his family's legacy drew him back to Audemars Piguet in 1997. Elected to the Board of Directors in 2003 and later becoming Vice-Chairman in 2014, Olivier has upheld the spirit of independence and excellence that defines the brand. He is dedicated to preserving the craftsmanship and values of his ancestors while driving innovation within the company.

Olivier's contributions extend beyond watchmaking. He has fostered collaborations with cultural institutions, joining the Board of the Claude Nobs Foundation in 2016 and the Swiss Institute Contemporary Art New York in 2021. His passion for the arts led him to play a key role in the Montreux Jazz Digital Project and PLATFORME 10, promoting interdisciplinary artistic endeavors.

Committed to his community, Olivier also serves on the Board of the Ensemble Hospitalier de la Côte and founded the Mikado Foundation in 2023 to support medical research. In his spare time, Olivier enjoys mountain sports and reflects on the complexities of time and space through his interest in cosmology and quantum physics.



Philip Best

Fund Manager at Quaero Capital

Philip Best is the Chairman of QUAERO CAPITAL's Board. He is also a Founding Partner of the company and a Portfolio Manager.

Philip started his career as a fund manager at Warburg Investment Management in 1983 initially as a trainee, then managing the Mercury European Income Fund. In 1987, he joined Enskilda Securities as a broker specialising in European small cap companies. In 1994 he established and ran the Paris office of The Europe Company Limited, a specialist research-driven European small cap brokerage (purchased by Jefferies & Co in 2000).

In 2003, Philip launched The Argonaut Fund, a fund he still manages today.

Philip graduated from Oxford University. He worked in London and Paris before he settled in Geneva. He is bilingual in English and French.

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Marc Buchli, CIO Panel Moderator

Co-CEO, Flick Family Office & Foundation

With over 23 years of experience, including 17 years in Asia, Marc is an accomplished asset management professional. Currently, as Co-CEO at Flick Family Office & Foundation, he is responsible for steering the strategic direction, ensuring operational excellence, and driving investments across diverse asset classes, strategies, and global markets. Through a blend of analytical prowess, entrepreneurial spirit, and innovative thinking, Marc thrives in navigating the complexities of ever-evolving investment landscapes. Prior to his current role, he held key positions at Silverhorn Group, Credit Suisse, and UBS. Marc holds a Bachelor of Science (Honours) in Finance from University College, Dublin.



Luca Evangelisti

Investment Manager and Head of Credit Research at Jupiter Asset Management

Luca joined Jupiter in 2013 and is an Investment Manager & Head of Credit Research in the Fixed Income team. He was previously a credit analyst before taking on the role of Head of Credit Research in 2019. He has been managing the Jupiter Financials Contingent Capital Fund since July 2020. Prior to joining Jupiter, Luca was a financial analyst on the Southern European team at Goldman Sachs before moving to Moody's Investors Service as an associate credit analyst in the banking team. Luca has a bachelor degree in Business Administration (summa cum laude) and a master degree in International Corporate Finance (summa cum laude) from Luiss Guido Carli University.



Philipp Fertig, CFA

Head of Securities, Silence Family Office AG

Philipp Fertig has been serving as Head of Securities at the Silence Family Office AG since Oct 2018. Prior to this role, he worked as an Equity Analyst at Hauck & Aufhäuser. During his tenure at the private bank, he was responsible for the buy-side analysis of the technology, industrial, retail, and banking sectors. At the Family Office, Fertig oversees the management of liquid assets, including strategic asset allocation and the monitoring of asset managers. He has been a CFA Charterholder since 2018.

Investing in Healthcare - A Strategic Pillar of Your Equity Allocation

While the stock market has risen strongly in 2024, investors remain understandably cautious about the ongoing shift in monetary policy and the risk of a potential policy misstep. For those seeking quality and sustainable growth at a reasonable price, the healthcare sector presents a compelling opportunity. In particular, small and mid-cap companies, as well as emerging markets, appear especially attractive after a multi-year sell-off, now offering robust margins of safety.

Since 1990, the healthcare sector has delivered an annualized return of 11.6%¹, coupled with the third-lowest volatility among S&P sectors. We see significant growth opportunities ahead, driven by breakthroughs in biopharma and medtech, sector-wide digitalization, as well as increased public and private healthcare investment in emerging markets (EMs). The vital role of healthcare in society, with resilient demand propelled by aging demographics, continues to serve as a powerful catalyst for high-impact innovation, with effects rippling across the global economy and the healthcare sector.

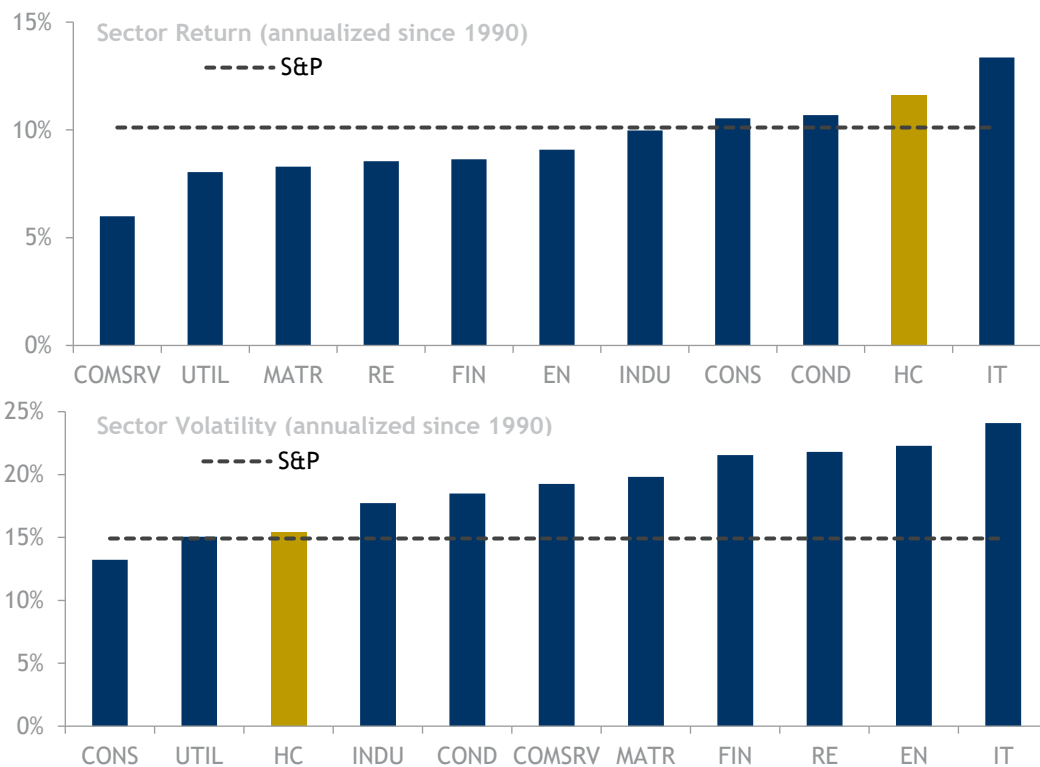


Figure 1: Annualized Return & Volatility of S&P Sectors²

Innovation & Rapid Digitalization Offer Durable Growth Opportunities

Drug discovery may be at a pivotal moment, driven by a deeper understanding of drug targets enabled by advances in technologies such as genomics, imaging, and more. Cutting-edge computational capabilities and the increasing use of artificial intelligence are expected to improve drug development success rates in the coming years. New therapeutic technologies, including those focused on ribonucleic acid (RNA), hold great promise for advancing standards of care and treating conditions previously considered untreatable. Regulatory authorities are also likely to continue refining policies and processes to expedite

and streamline the development of critical new medicines, delivering substantial value to both patients and healthcare systems.

The need to optimize scarce healthcare resources has resulted in a remarkable acceleration in the adoption of digital solutions. Compared to other sectors, healthcare had been slow to embrace digital platforms. Now, virtual platforms powered by robust data and analytics have become essential. This shift has been accelerated by widespread clinician adoption, increased patient awareness, and improved payor reimbursement. We believe that digital innovators and early adopters are best positioned to improve upon traditional patient pathways and outperform over the long term.

Emerging Market Healthcare Growth: Beyond Demographics and Income Levels

Emerging-market healthcare presents resilient growth opportunities supported by rising national health expenditures, local expertise, and expanding R&D capabilities. Innovative trends in biopharma, services, and medtech are increasingly visible in these markets, often backed by targeted national initiatives. We expect these investments to remain a priority, underpinning further economic development. Emerging innovation hubs are fostering domestic growth while attracting partnerships with multinational corporations, including those from developed markets. This cross-pollination of healthcare innovation is likely to drive continued improvements in global health.

About Sectoral Asset Management

Established in 2000, Sectoral Asset Management is one of leading specialists in managing global healthcare portfolios. We are fully employee-owned, with offices in Montreal, Geneva and Hong Kong. The company provides investment management services to professional and institutional clients, including pooled funds, private banks and family offices. In addition, we have long-standing sub-advisory relationships with institutional investors in Europe and Asia. More on www.sectoral.com

Sources:

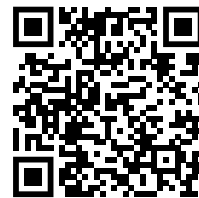
¹ Bloomberg

² Bloomberg

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Alexa Firmenich (SFO)

Alexa Firmenich, Investor, Consultant and Facilitator on the Climate Crisis

Alexa Firmenich is an investor, consultant and facilitator focused on climate and biodiversity. She is the co-director of SEED, a new center of the Crowther Lab at ETH Zurich. SEED is developing the world's most holistic measure of biodiversity that reflects multiple scale's of nature's complexity for any location on the planet, with the goal to steer financial and political decision-makers to crystallise the value of nature into the global economy. Alexa is also the founder of Ground Effect, an animist investment vehicle that supports early stage nature-based solutions, scientific research and new economic models. Parallel to this work she is trained as a group facilitator in leadership development and ecological pedagogy, designing multi-day learning journeys through her role at Leaders' Quest. She is also an author, podcast host of Lifeworlds, a founding board member of Terra Habitus, a Mexican environmental fund that operates large-landscape conservation and watershed restoration, and a wilderness guide.



Dominic Hofstetter

Executive Director of the TransCap Initiative

Dominic Hofstetter is the Executive Director of the TransCap Initiative, whose mission is to build the field of systemic investing, a new investment logic for funding systems transformation. He initiated and incubated the TransCap Initiative when he was the Director of Capital and Investments at EIT Climate-KIC, Europe's largest climate innovation initiative, where he was responsible for building the organization's nascent investment function. Before joining EIT Climate-KIC in 2015, Dominic had worked as an entrepreneur at the renewable energy start-up Electrochaea, as a private equity investor at Hudson Clean Energy Partners, and as a finance professional in the institutional asset management division of Credit Suisse. He holds an MBA from the University of Chicago Booth School of Business and an MSc from the Environmental Change Institute at the University of Oxford.



Conference Chairman – Marius Holzer, CFA

Partner at Parkview Group

A multi-faceted career of 30 years in the wealth management industry, fostering strategic and operational excellence as advisor, coach, project leader, and manager of origination as well as back office units provided Marius with a wealth of cross-functional experiences and professional knowledge.

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Today, Marius serves as Chief Operating Officer of Parkview, a global Multi-Family Office, which he co-founded in 2011, and he is a Senior Advisor and Associate Partner at Cambridge Family Enterprise Group, a global organization, founded in 1989, devoted to helping families achieve multigenerational success for their families, enterprises, and financial wealth.

Marius is a trained economist and certified expert in information technology with an MBA from INSEAD. He is both, a CFA and CAIA charter holder and earned a certificate in Advanced Risk and Investment Management of Yale School of Management/EDHEC.



Dr. Stefan Larson

Venture Partner, Sectoral Asset Management

Stefan joined Sectoral in 2018 and is currently a Venture Partner in the firm's venture capital group. He serves as a director on the boards of Contineum Therapeutics, Prilenia Therapeutics, Lenz Therapeutics, and Amolyt Pharma. Stefan graduated in 1997 from McGill University with a B.Sc. in Biology, and in 1999 from University of Toronto with an M.Sc. in Molecular and Medical Genetics. He completed his Ph.D. in Biophysics at Stanford University in 2004. Prior to joining Sectoral, Stefan was an Entrepreneur-in-Residence and later Venture Partner with Versant Ventures, where he led the establishment of their Toronto-based Discovery Engine and was the founding CEO of Northern Biologics. He was also a cofounder of two medical device companies: Perimeter Medical Imaging, and Tornado Spectral Systems. He began his career at McKinsey & Company in San Francisco and Toronto.



Frank Lipowski

Portfolio Manager and Analyst, Flossbach von Storch

Frank Lipowski has been working as a Portfolio Manager and Analyst at Flossbach von Storch since 2009. Prior to this he worked in portfolio management and the execution desk at Partners Group AG in Switzerland from 2007 until 2008. From 2003 until 2007 Mr Lipowski did a traineeship in Portfolio Management at Lupus Alpha Asset Management in Frankfurt. He studied Business Administration at the Frankfurt School of Finance & Management and the University of Colorado (2003 – 2007).



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Flossbach von Storch - Bond Opportunities was recognised by LSEG Lipper Fund in 2024 as:
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Source: Lipper Fund Awards from London Stock Exchange Group (LSEG) @2024 LSEG. All rights reserved. With permission and protected by the U.S. Copyright Act. No distribution, copying, retransmission or printing of the content is permitted without prior permission. Data as of March 2024. The LSEG Lipper Fund Awards, granted annually, highlight funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers. The LSEG Lipper Fund Awards are based on the Lipper Leader for Consistent Return rating, which is an objective, quantitative, risk-adjusted performance measure calculated over 36, 60 and 120 months. The fund with the highest Lipper Leader for Consistent Return (Effective Return) value in each eligible classification wins the LSEG Lipper Fund Award. To be eligible for the award, the funds must have UCITS status and be registered for sale in at least three out of 30 EEA Member States and United Kingdom and Switzerland. The Flossbach von Storch - Bond Opportunities fund has been awarded as the best five-year and 10-year Bond Global EUR fund relative to their peers in Europe in 2024. Lipper Leaders fund ratings do not constitute and are not intended to constitute investment advice or an offer to sell or the solicitation of an offer to buy any security of any entity in any jurisdiction. For more information, see LSEG Lipper Fund Awards | Funds and Fund Management Firms.

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Flexibility is crucial in a challenging and dynamic market environment. The Flossbach von Storch - Bond Opportunities Fund offers an innovative investment strategy that focuses on active customisation and global diversification. Instead of limiting itself to fixed maturities, this Fund maximises the return potential by selectively shifting between different market segments and bonds.

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Scan the QR code to find out more about Flossbach von Storch - Bond Opportunities!

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Please refer to the factsheet for the opportunities and risks associated with the Flossbach von Storch - Bond Opportunities Fund, as well as information regarding the costs. The factsheet can be accessed by scanning the QR code or via the following hyperlink: <https://www.flossbachvonstorch.ch/de/fonds/LU0399027886>.

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Dr. Kurt Moosmann

President of Switzerland's Single Family Office Association (SFOA)

Dr. Kurt Moosmann is a highly regarded expert with over 30 years of experience advising business-owning families, family offices, and entrepreneurs globally. He founded Moosmann Advisors in 2014 and previously co-founded Dara Capital, a multi-family office with locations in Zurich and New York. Dr. Moosmann has held leadership roles at Quilvest Switzerland and Deutsche Bank's International Wealth Planning Division.

Today, he serves as Executive Vice-Chairman of Elsa Peretti Holding Ltd., the family office of the late jewelry designer Elsa Peretti, and Vice-Chairman of the Nando and Elsa Peretti Foundation. Since 2019, he has been President of Switzerland's Single Family Office Association (SFOA). A native Swiss-Canadian, Dr. Moosmann holds a Doctorate of Law from the University of Zurich and an MBA from Carnegie Mellon University.

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Maria Obrecht, CFA

UBS Wealth Management

Maria has 20 years of experience in investment management, advising both institutional and private clients across various asset classes. In her current role, Maria is focused on expanding UBS's client franchise with ultra-high-net-worth entrepreneurs, their operating businesses and their family offices. Maria spent the majority of her career to date at Goldman Sachs in New York and Zurich. Additionally, she has developed expertise in fund selection at Rothschild and infrastructure investing at Partners Group.

Maria holds a Bachelor degree from Smith College, USA, and an MBA from London Business School and Hong Kong University of Science and Technology. She is also a CFA Charterholder.



Felix Oeschger

Board Member Switzerland's Single Family Office Association (SFOA)

Felix Xaver Oeschger is a Senior Family Officer Executive with a distinguished career in the financial sector. He currently holds an executive position as CIO/COO at Gaydoul Group and is board member of the Swiss Single Family Offices Association (SFOA).

Previously, Felix was Head of Zurich at Julius Baer, where he was in charge of the firm's operations and client services in the region. Prior to joining Julius Baer, Felix was Head of Private Client Services in Zurich at Lombard Odier, where he contributed to the bank's growth and client development strategies in German-speaking part of Switzerland.



Dr. Falko Paetzold

CSP Initiator and Managing Director

Falko is the Initiator and Managing Director of the Center for Sustainable Finance and Private Wealth (CSP) at University of Zurich. CSP is a spin-off from the Next Gen Impact Investing program that Falko co-initiated at the Initiative for Responsible Investment at Harvard University. Before CSP, Falko was a fellow at Harvard, a postdoctoral researcher at MIT Sloan, Sustainability Analyst and M&A Consultant at Bank Vontobel, and partner at the sustainable investing consultancy Contrast Capital. Falko founded GreenBuzz, an international network of

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sustainability intrapreneurs. Falko is an advisor on impact topics at organisations ranging from the Swiss Association of Wealth Managers, the sustainability fintech start-up Inyova, the foundation for music schools Zurich (MKZ), the sustainability fund manager ACATIS Fair Value, the bank ZKB, the wealth manager Riedweg & Hrovat, and the sustainability-intrapreneur community GreenBuzz Zurich.

Falko enjoys sports in the mountains, ranging from mountain biking over freeride snowboarding to ski touring.



Laurent Stöckli

Equity Research Analyst at Quaero Capital

Laurent joined Quaero Capital SA in August 2017 in the role of Research Analyst. He is Senior Research Analyst.

He started his career working for a Swiss-based Hedge fund as research analyst and then Portfolio manager. Several years later, he joined the international family office, Stanhope Capital, with responsibility for the portfolio management in Geneva for Ultra High Net Worth Individual clients. Laurent holds a Bachelor in Business Administration from the University of Applied Sciences Western Switzerland.



Malgorzata van Zyl, CFA

Former Chief Investment Officer, Philanthropic Co-Founder
Making Sustainable Impact and VC Entrepreneur

Malgorzata van Zyl, CFA, is a seasoned institutional and impact investor. Over the last 10 years in her role as the CIO at a Single Family Office, Malgorzata headed the asset allocation and investment selection in both liquid and private markets, and held multiple board positions. Prior to that she advised Ultra High Net Worth individuals (Credit Suisse, Zurich) and European institutional investors (UBS & CAIB, London), on tailored investment strategies. Additionally, she co-founded More 2 Life for impactful community support and empowerment through education.

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Marc Saint John Webb

Fund Manager at Quaero Capital

Marc joined Quaero Capital SA in 2006 as portfolio manager. He started investing in European equities in 1987, when he joined Warburg Securities in Paris. He subsequently worked as a research analyst for Schelcher Prince before moving on to small cap stock picking at Oddo. In 1997, he joined CCF Elysées Bourse as Head of the Small Caps Division, where he developed a new research product dedicated to smaller companies. He oversaw a number of IPOs and raised further capital for listed smaller companies. In 2001, he co-founded IXIS-Rothschild Midcaps, a Paris-based joint venture specialising in corporate brokerage and research on French mid-sized companies.

Marc studied at Aston Business School in England, the Complutense University of Madrid in Spain and INSEAD in France. He holds the diploma of the SFAF (the French Society of Financial Analysts).



Carl Wieandt

CEO and Delegate of the Board of Directors of Suscap Advisors AG (SFO)

Carl Wieandt is CEO and Delegate of the Board of Directors of single-family office suscap advisors ag in Zurich. Suscap is an acronym for sustainable capital protection, the mission of the family office.

On behalf of the sole shareholder, Carl has been building the suscap Family Office since 2015. In addition to this role Carl has many years of experience as a board member and investment committee member of other family companies.

Prior to joining suscap, Carl was amongst others a Partner at McKinsey & Company, Executive Director at Goldman Sachs and a member of Lazard's management team for the German-speaking region. Both during his tenure as banker and consultant Carl has worked extensively with Private Equity sponsors. Carl has lived and worked in five financial centers around the world.

Carl is a Certified International Wealth Manager (CIWM), a Certified Options and Futures Trader (Eurex) and Certified Exchange Traded Funds Specialist (Deutsche Börse). He holds a master's degree in business administration and finance from the Université de Fribourg, Switzerland.

CONFERENCE ORGANIZATION

The mission of CFA Society Switzerland is to lead the investment profession in Switzerland by fostering the highest standards of integrity, knowledge and professionalism in the investment industry, for the ultimate benefit of society.

It represents more than 3,500 members to promote the values represented by the CFA® designation, provide continuing education, support CFA candidates, and strengthen the network between members.

CFA Society Switzerland conferences are created by Society volunteers with domain expertise with the goal of providing independent, relevant and credible platforms of exchange and education at the cutting edge of knowledge.

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Partner, Parkview Group, Generation Conference Committee Chair

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Stefan Bohren, CFA,

Co-Founder, FAHAMU

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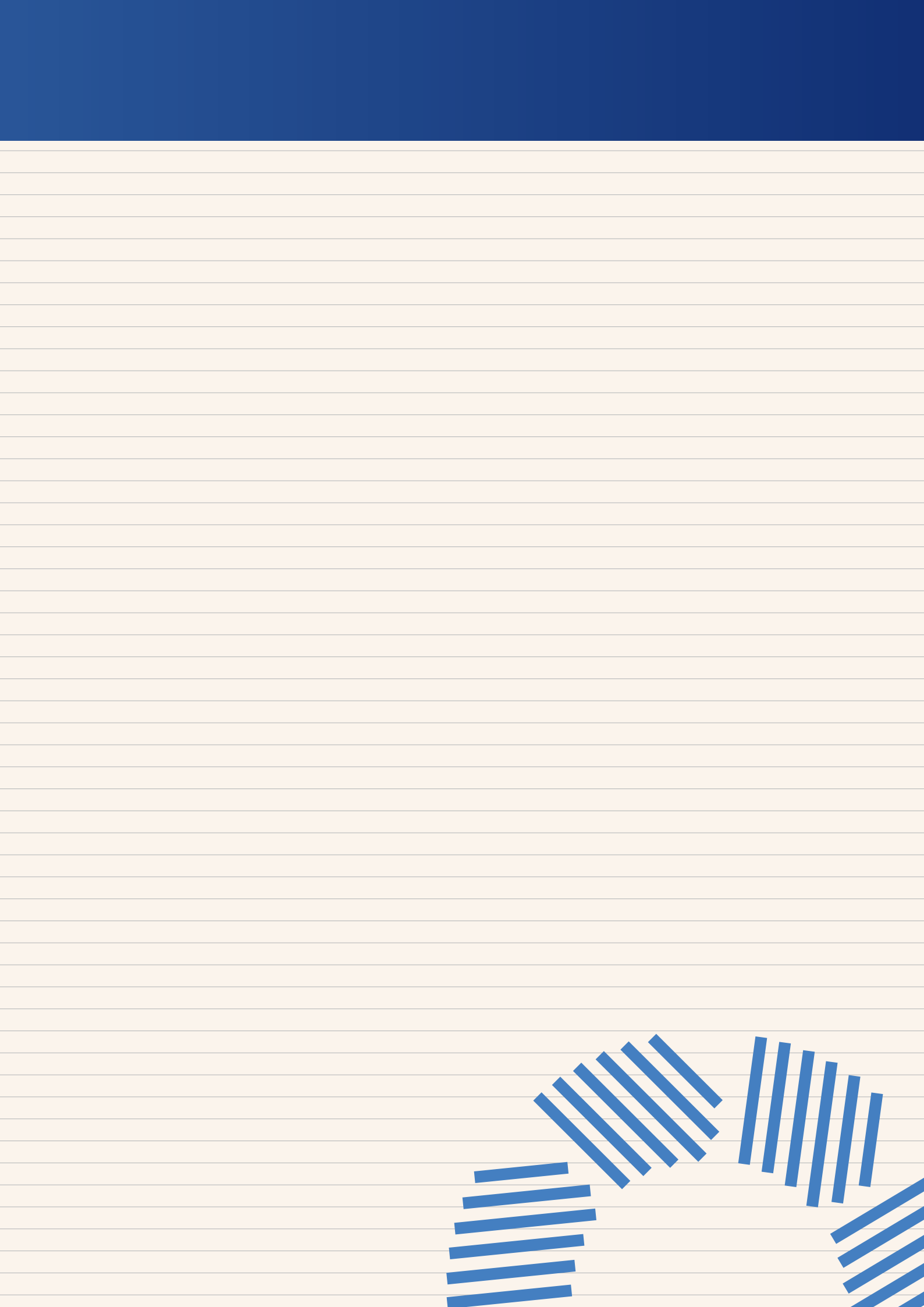
Matthias Schulthess, CFA,

Managing Partner, Schulthess Zimmermann & Jauch

Louise Bergholtz,

Event Manager, CFA Society Switzerland

Notes #GC24





INVESTING IN EUROPEAN SMALL CAPS



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