

## SSF/EY Practitioners' Guide Webinar: Practical insights into the advisory process for private clients

25 November 2022, 10-11.15 am

In July 2022 SSF and EY published a Practitioners' Guide on the integration of sustainability preferences into the advisory process for private clients. The report aims to shed light on and provide solutions for the risk that clients can be consciously or unconsciously misled about the sustainability characteristics of financial instruments and services, resulting in expectation gaps. In this webinar, we will summarize the main findings and outline the recommendations. In addition, our guest speaker will provide insights on the practical implementation of the recommendations.

### Programme

10:00	Section title	Speaker
10:00-10:05	Welcome	Katja Brunner, Director Legal & Regulatory, SSF
10:05-10:15	Regulatory Landscape	Katja Brunner, Director Legal & Regulatory, SSF
10:15-10:25	Overview SSF/ EY Practitioners' Guide	Stephan Geiger, Lead Sustainable Finance Switzerland, EY
10:25-10:35	Clients sustainability preferences, the Swiss and European perspective	Rosa Sangiorgio, Head ESG, Pictet Wealth Management
10:35-10:45	Sustainability preferences: The product perspective	Erol Bilecen, Head Competence Center Sustainability Investments, Raiffeisen
From 10:45	Q&A	Speakers answer questions from participants
11:15	End	

The webinar is free for SSF members and costs CHF 50 for non-members. It will take place via Zoom.