



# Welcome

## WEALTH MANAGEMENT WITH IMPACT

# PROGRAM

16:00-16:05	Welcome note and introduction	<b>Sabine Döbeli</b> , CEO, SSF
16:05-16:20	10 Arguments why sustainable investing is a unique opportunity for private wealth management	<b>Kelly Hess</b> , Project Manager, SSF
16:20 – 16:35	Client needs and how to make them investable	<b>Bertrand Gacon</b> , Head SRI and Impact Investing, Lombard Odier
16:35 – 16:50	The true impact of impact investing - how do investments contribute to change?	<b>Philip Walker</b> , Managing Director, Investments Africa, Obviam
16:50 – 17:50	Panel Discussion: Are private clients the new advocates for change?	<p>Moderated by <b>Angela De Wolff</b>, Partner, Conser Invest</p> <ul style="list-style-type: none"> <li>• <b>Roland Dominicé</b>, CEO, Symbiotics</li> <li>• <b>Johnny El Hachem</b>, CEO, Edmond de Rothschild Private Equity</li> <li>• <b>Olivier Rousset</b>, Head Impact Investments, Credit Suisse</li> </ul>
17:50 – 18:00	Closing statements	

# VISION UND MISSION

## SSF Vision

Switzerland becomes a leading centre for sustainable finance, offering growth opportunities for the Swiss economy and benefitting society at large

## SSF Mission

We strengthen the position of Switzerland in the global marketplace for sustainable finance by informing, educating and catalyzing growth



# SSF MEMBER BASE

## TYPE OF ORGANISATION

22 Banks

26 Asset Managers

5 Insurance Companies

9 Other Asset Owners

20 Service providers

3 Public sector

5 Other NPOs

8 Universities & Business Schools

## 98 MEMBERS AND NETWORK PARTNERS

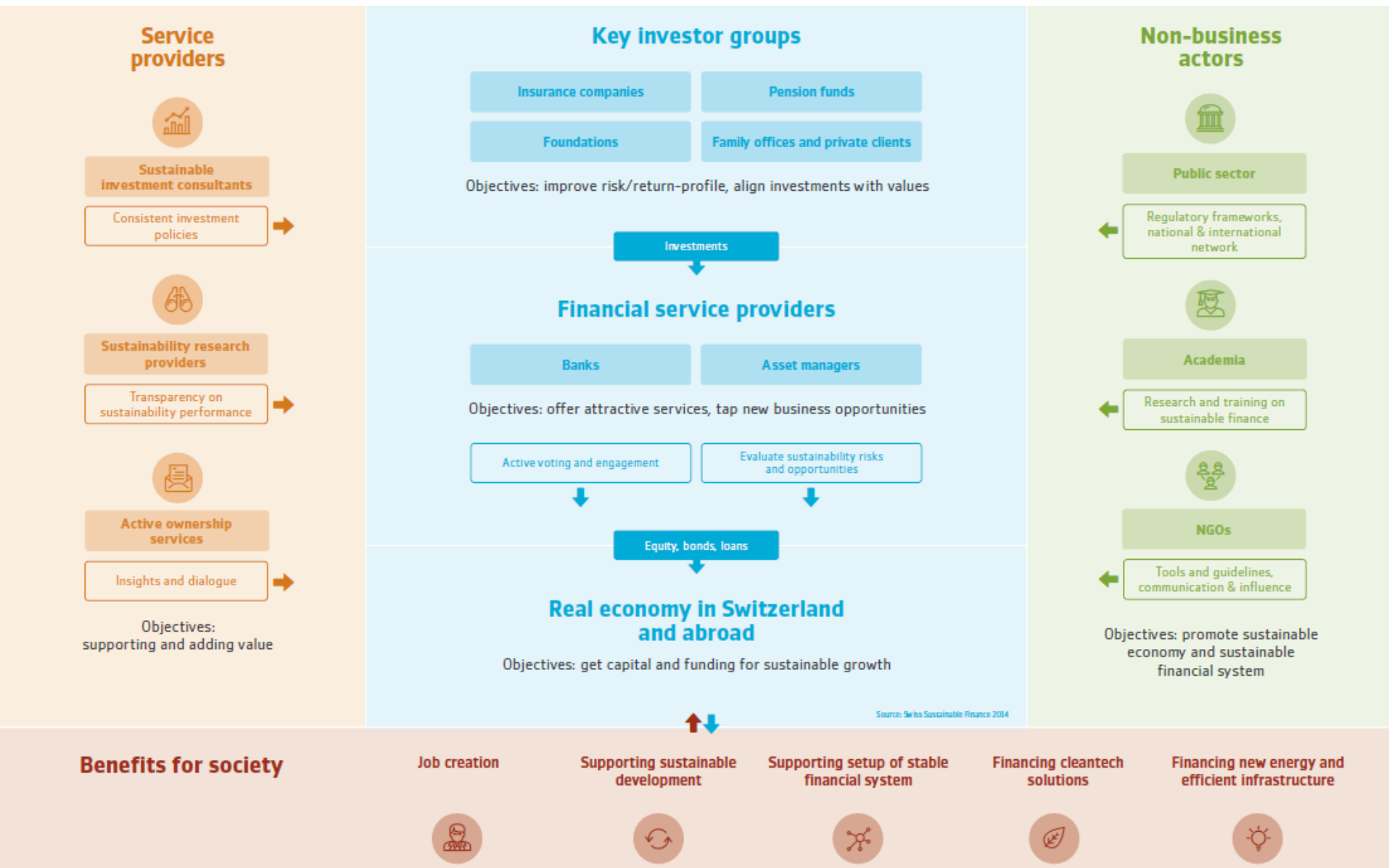




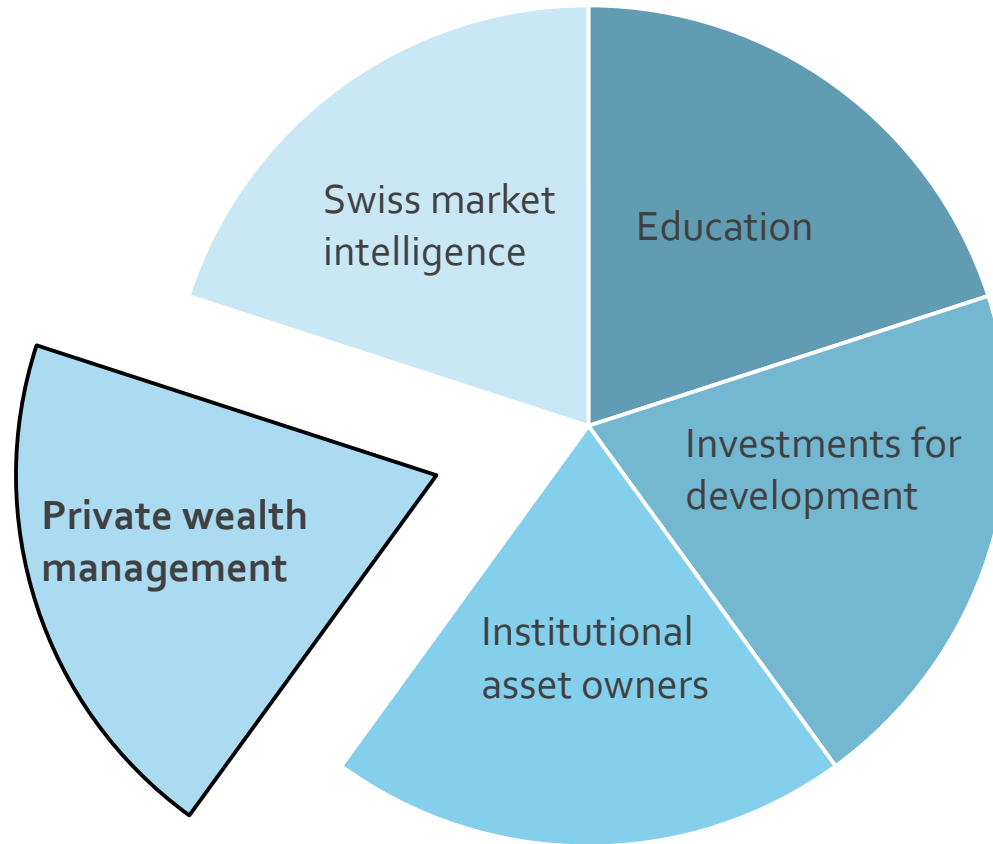


# SUSTAINABLE INVESTING IS A UNIQUE OPPORTUNITY FOR PRIVATE WEALTH MANAGEMENT

# LANDSCAPE OF SWISS SUSTAINABLE FINANCE



# SSF MEMBER TECHNICAL WORKGROUPS



# SSF PRIVATE WEALTH MANAGEMENT WORKGROUP

16 active organisations



**RAIFFEISEN**



Julius Bär



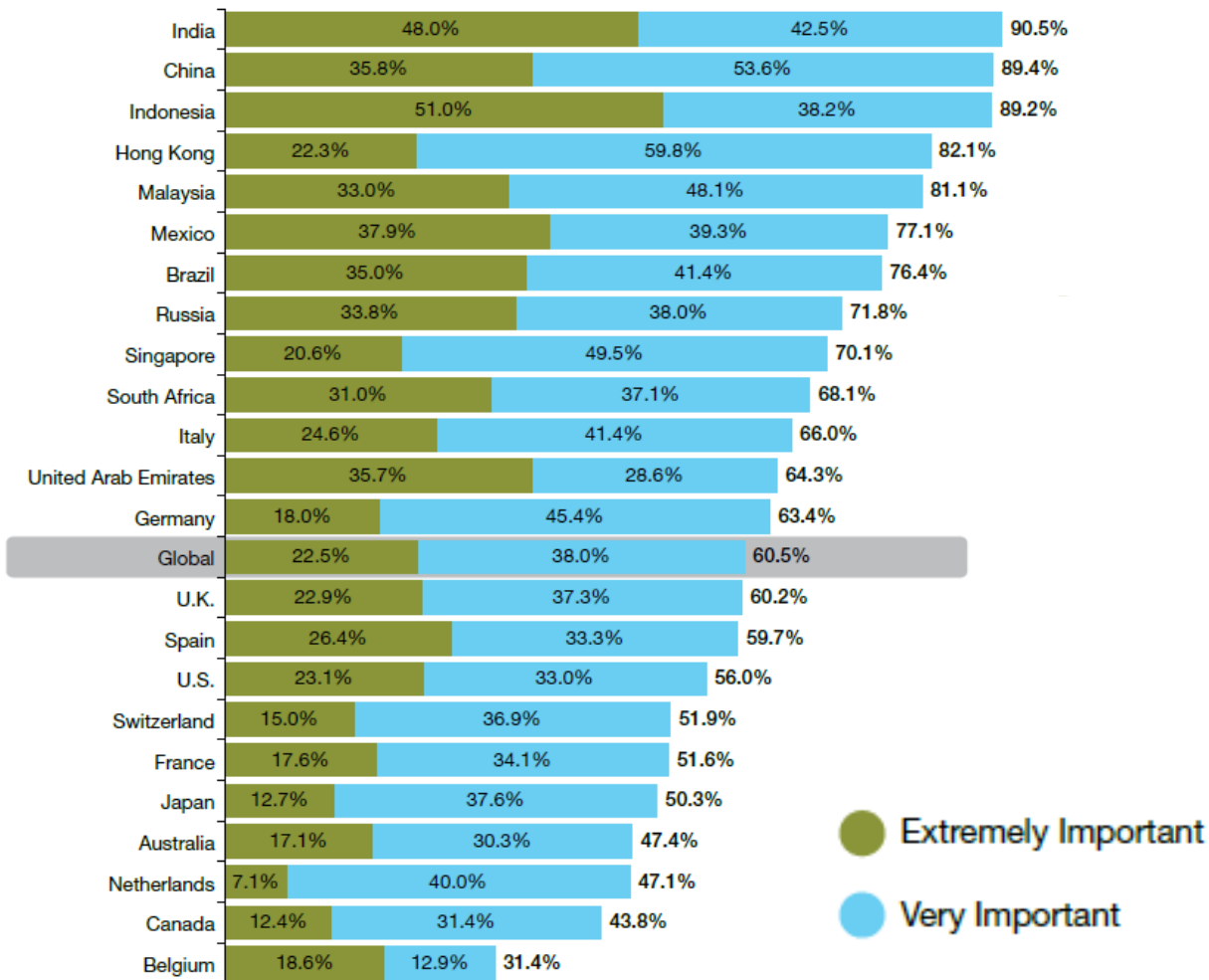
**Vontobel**





# WEALTH MANAGEMENT TRENDS

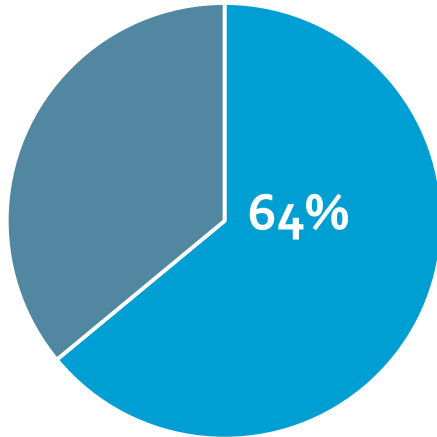
# TRENDS – MORE INVESTORS INTERESTED IN SUSTAINABLE INVESTING



Source: Capgemini, 2014 World Wealth Report

How important is it to you to give time, money and/or expertise with the goal of generating positive social impact?

# TRENDS – MORE INVESTORS INTERESTED IN SUSTAINABLE INVESTING



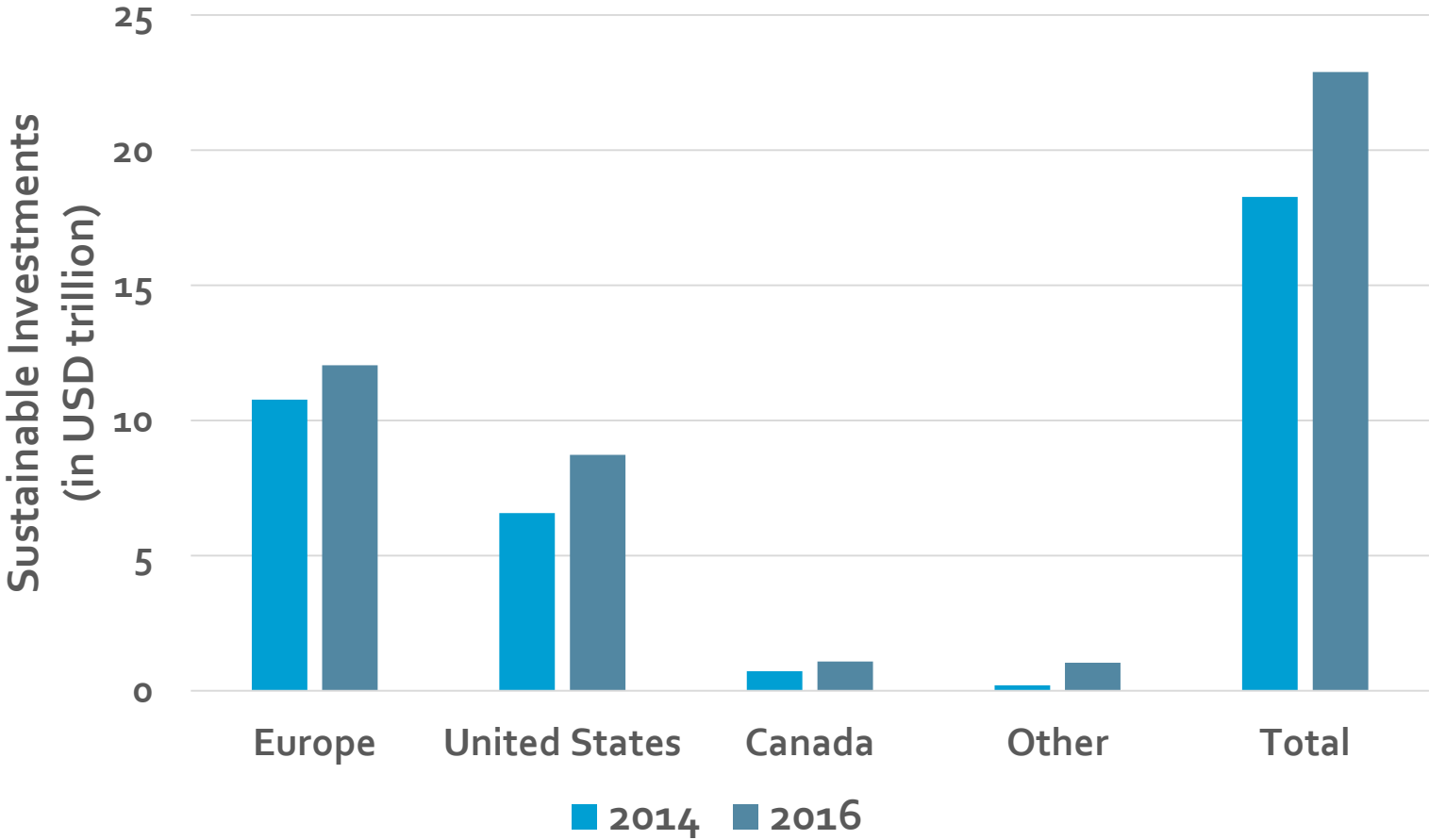
64% of investors would like their money to support companies which are **profitable** and at the same time make a **positive contribution to society and the environment**



Millennial investors are **2X as likely** as the overall investor population to invest in companies targeting social or environmental goals

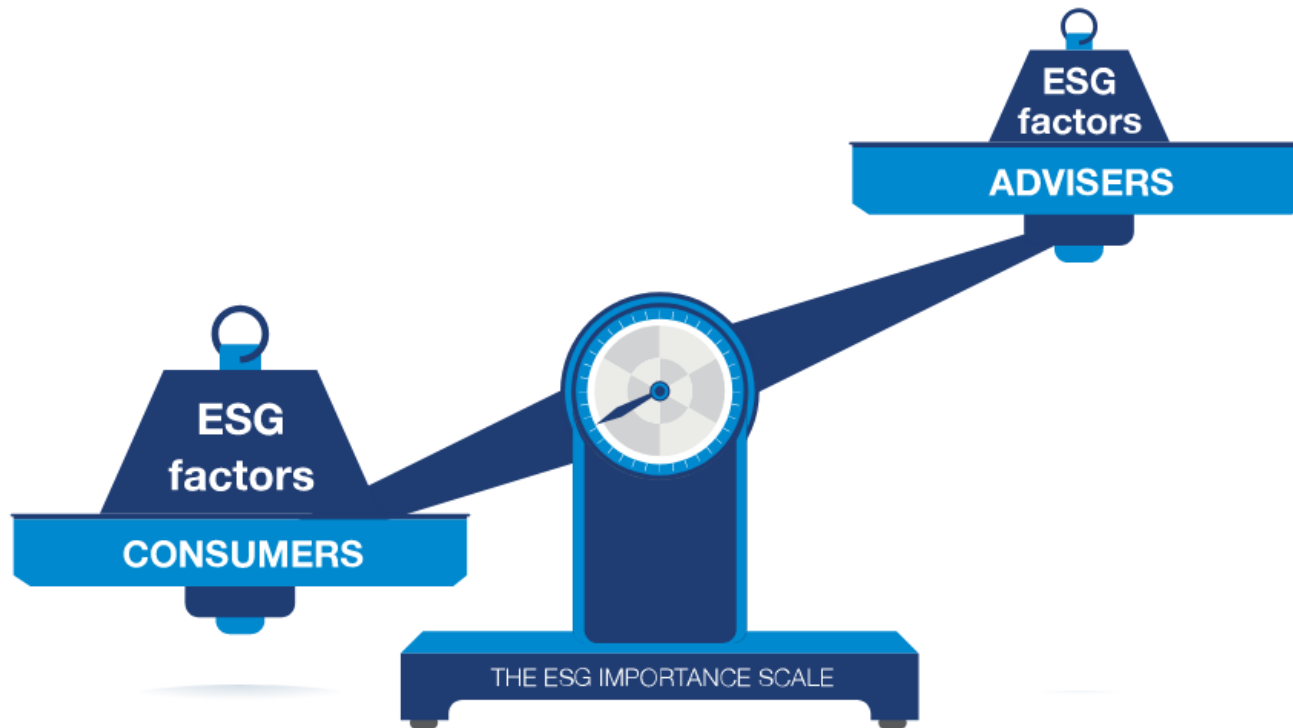
Source: Morgan Stanley, 2017; Triodos, 2017

# GROWTH OF SUSTAINABLE INVESTMENT ASSETS



Source: Global Investment Alliance, 2017

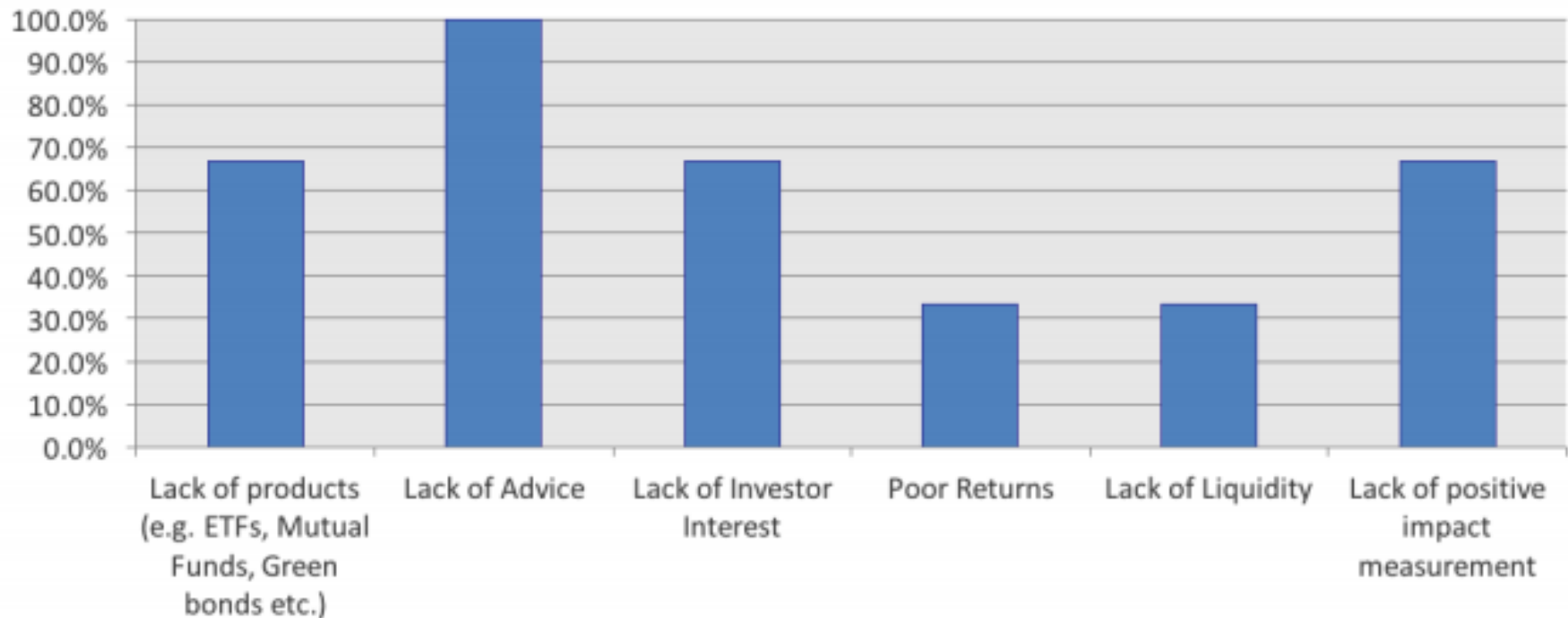
# TRENDS – CONSUMER AND ADVISOR DISCONNECT



Source: Schoders, 2017

# TRENDS – CONSUMER AND ADVISOR DISCONNECT

## Key obstacles to Sustainable Investment (as reported by UHNWIs)



Source: Smith School of Enterprise and the Environment, University of Oxford, 2017



## Discrepancy:

Clients are very interested in sustainable investing	BUT...	the theme is rarely addressed during client meetings
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## Why?

### Advisors tend to -

- shy away from ethical debates and uncomfortable questions
- feel they have limited support from bank
- hold biases concerning sustainable products (i.e. performance, risk, limited product offering)

# 10 ARGUMENTS FOR CLIENT ADVISORS

# PROJECT OUTPUT

1. Detailed text with supporting material on the 10 Arguments
2. Practical tools
3. Two slide-decks
  - a) Detailed summary
  - b) Important points and visualisation
4. A short thematic film



# 10 ARGUMENTS – 3 MAIN CATEGORIES

- Improved client engagement (Arguments 1-5)
- Positive effects on financial performance (Arguments 6-8)
- Broad product palette that matches Swiss strengths (Arguments 9-10)



# IMPROVED CLIENT ENGAGEMENT

## Arguments 1-5

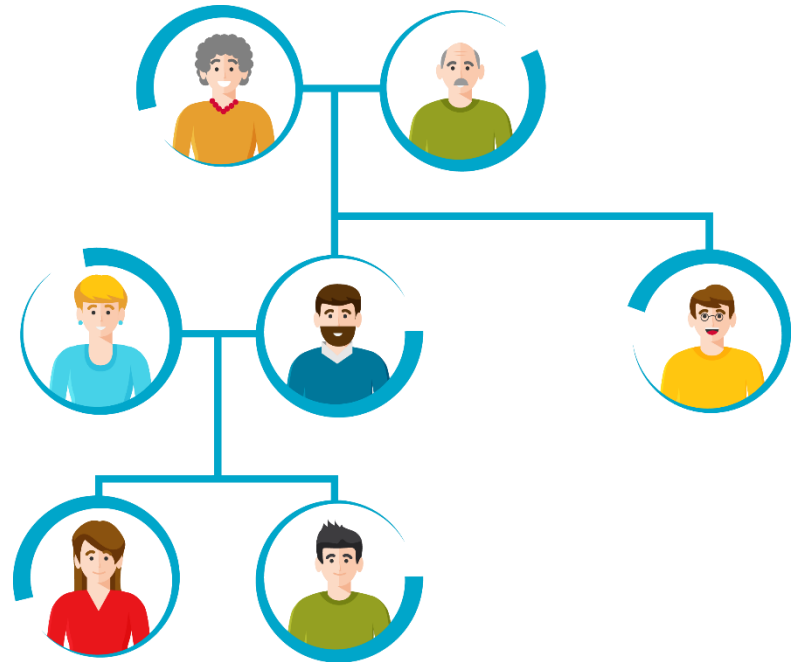
1. Meet growing client interest in sustainability
2. Strengthen relationships with clients
- 3. Attract and retain the next generation of clients**
4. Communicate "impact" to excite clients
5. Turn client focus toward long-term performance

# 10 ARGUMENTS

## Improved client engagement

### ARGUMENT 3: ATTRACT AND RETAIN THE NEXT GENERATION OF CLIENTS

- “Next gens” of high net worth families are set to inherit about USD 41 trillion
- Younger generations have growing interest in sustainability topics as they grew up with sustainability issues
- Sustainable investing is a way to captivate the interest of these generations





# POSITIVE EFFECTS ON FINANCIAL PERFORMANCE

## Arguments 6-8

- 6. Identify well-managed companies based on good ESG credentials
- 7. Mitigate risks related to company reputation**
- 8. Build better client portfolios

# 10 ARGUMENTS

## Effects on financial performance

### ARGUMENT 7: MITIGATE RISKS RELATED TO COMPANY REPUTATION

- Intangible value accounts for a large share of company value
- Poor corporate behaviour endangers the value of a company
- Potential risks can be managed through the consideration of ESG data in investments



# BROAD PRODUCT PALETTE THAT MATCHES SWISS STRENGTHS

Arguments 9 and 10

**9. Tap into a broad variety of products and solutions**

10. Champion Swiss values



# 10 ARGUMENTS

## Broad product palette that matches Swiss strengths

### ARGUMENT 9: TAP INTO A BROAD VARIETY OF PRODUCTS AND SOLUTIONS

- The sustainable investment product landscape is well developed:
  - a broad range of products exists for all major asset classes
  - sustainable AuM rose substantially over recent years
  - most Swiss banks have sustainable investment products in their standard offering
- The Swiss investment industry is a global leader and innovative hub for sustainable investment solutions



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## CONTACT

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