



10th RICHMOND FINANCE SUMMIT

BEAU-RIVAGE PALACE LAUSANNE
5-6 OCTOBER 2017





“Stimulant discussions with gaining new angles amongst seniors within the Finance Industry.”

Martin Vetsch, Bank Vontobel AG

10th RICHMOND FINANCE SUMMIT

WHY should you attend the event?

In a rapidly evolving financial landscape the Richmond Finance Summit is a unique event, designed for the key decision-makers and supplier companies of the wealth management and investment industry. Pre-scheduled one-to-one business meetings and an outstanding conference programme allow you to:

- Discover new trends and possibilities.
- Learn from both experts and peers.
- Debate, evaluate and share key issues.
- Build strong, long lasting relationships.

WHEN? 5–6 October 2017

The event starts on Thursday with a keynote, following a business lunch and finishes on Friday early afternoon. The accommodation for Thursday night is complimentary.

WHO will be attending?

Delegates

Senior decision-makers from leading banks and other financial institutions in Switzerland, Luxembourg and Monaco. Senior 3rd party fund selectors from private banks, family/wealth offices and independent asset managers.

Suppliers

Based on the requirements of the attending delegates, the suppliers at the event will be offering a broad range of solutions including:

- Companies offering services & products on how to operate your financial institution.
- Companies offering a broad range of investment opportunities.

Speakers

International experts in the fields of economics, finance, investment strategy, product development, wealth management, IT and training.

WHERE? Beau-Rivage Palace Lausanne

Considered to be one of Europe’s finest hotels, the Beau-Rivage Palace remains true to its traditional values while at the same time constantly breathing new life into the hotel. Nestling in 4 hectares of gardens on the shore of Lake Geneva and with a view of the Alps, this elegant five star hotel offers a unique service and perfect atmosphere for intensive networking sessions.

HOW will you spend your time at the event?

You will create a personalised itinerary, tailor-made to suit your needs. It will consist of:

Business Meetings & Mealtimes

Meet the decision-makers of your choice in prescheduled one-to-one meetings, each lasting 30 minutes, or meet them for mealtimes over breakfast, lunch or dinner.

Cutting-Edge Conference Programme

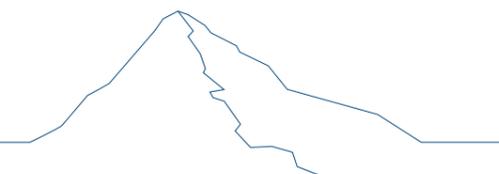
Enhance your knowledge through our focused conference programme delivered by experts and innovative speakers on topics chosen by delegates.

Peer Networking

Use the opportunity to meet your industry peers outside business hours in the relaxing environment of the Beau-Rivage Palace.

Additional Options

- Extend your stay with our special weekend rate.
- Enjoy a relaxing treatment in the Hotel’s SPA.





“Great and valuable Summit that definitively helps to ‘think out of the box’.”

François Siegwart, EMC Gestion de Fortune SA

THE DELEGATE EXPERIENCE

The Richmond Finance Summit is designed for senior decision-makers from the financial industry.

We offer you a time-efficient and effective platform during 1.5 days at the prestigious Beau-Rivage Palace in Lausanne. A personalised schedule gives you the opportunity to:

- Enhance your knowledge through our keynotes and first-class conference programme.
- Build strategic relationships with providers of your choice in one-to-one meetings.
- Peer networking with up to 120 senior representatives from banks, family/wealth offices and independent asset managers.

Attendance for delegates is free of charge and strictly by personal invitation only.

“An enriching experience: lots of good new contacts and food for thought and action!”

*Michaela Troyanov,
Post Finance AG*

“One of the most interesting, intense and structured 24h financial/banking event in the region.”

*Omar Shokur,
Credit Agricole Indosuez*

THE SUPPLIER EXPERIENCE

One of the most important factors for many delegates who decide to attend is the opportunity to source and benchmark potential product and solution providers in financial operations and investment banking.

If your business development strategy is meeting with these senior decision-makers, the Richmond Finance Summit offers you unrivalled new business opportunities with the top end of the financial marketplace:

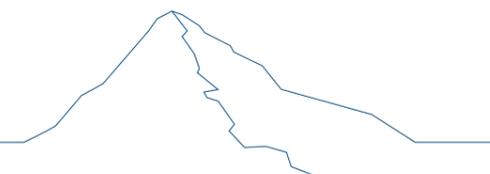
- Access to 120 delegates, key decision makers from leading banks and major financial institutions in Switzerland, Luxembourg and Monaco included senior 3rd party fund selectors.
- Pre-scheduled one-to-one business meetings with the delegates that have asked to meet you.
- The chance to participate in the conference programme with a supplier presentation.
- Small group meetings over mealtimes.
- Detailed profile information on each attending delegate.

“The Richmond Finance Summit is an extremely well organized event and a very good time management allow us to meet as many people.”

Patrick Lercoz, J. Safra Sarasin

“An efficient investment of time: several senior contacts, broad range of interest in the banking/WM sector.”

Michel Mathys, Avaloq





CONFERENCE HIGHLIGHTS – OUTLOOK

Conference highlights 2016

What next in the financial industry? Both keynotes from Prof. Garelli and Keith Coats gave us a professional outlook on a micro way, financial and in technological. The industry sessions presented a mix out of compliance and regulations, new trends in the digital wealth management and the first step in robo advisory. All delegates had a great exchange in their discussion groups consistently actual themes in the industry.

Out of the box? Always a great way to think in a different way – get new experience and use this way as advantage in your business environment.

The conference programme in 2017 will be shaped by the people whose views matter most – the audience. Conference topic ideas will be generated by discussions with delegates and leading industry experts.

Conference

The programme will be designed to include an interactive exchange of information on hot topics and latest trends which will inspire attendees, provide them with new ideas and key points to take away and implement within their organisations.

The conference programme will consist of workshops, think-tanks and personal development sessions based on feedback from our attending delegates.

Discussion Group

Several discussion groups will feature small numbers of senior professionals based on key themes. All group sessions will be led by expert moderators to give a high-level view of the industry, offering ideas and insights to help develop new strategies and goals.

Supplier Presentations

All suppliers have the chance to submit a supplier presentation. Delegates will evaluate and choose those presentations of most interest and relevance to them. The highest-rated presentations will be included in the conference programme.

“Extremely well organized and the sessions I attended were of great interest and quality.”

*P.Y. Augsburger,
Fuchs & Associés Finance SA*

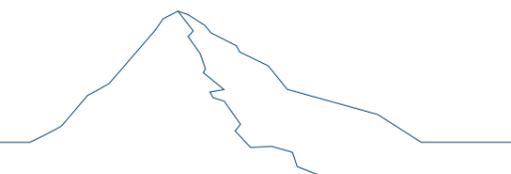
“A very well organized, insightful and inspirational event! The special format really offers a unique experience for everybody!”

*Ivo Furrer, Swiss Life Gruppe,
CEO Schweiz*



The tenth Richmond Finance Summit 2017 will host 210 senior financial professionals from the financial operations and asset management, spending their time developing their personal network.

We look forward to welcoming you at the 10th annual Forum in the Beau-Rivage Palace in October 2017.



For further information
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Following the success of our event format, we
anticipate 40 supplier- and 120 delegate companies.
We encourage all companies interested in
attending to contact us at their earliest convenience.

www.finance-summit.com

The Richmond Finance Summit
is organised by

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