

2ND ANNUAL PRIVATE BANKING SUMMIT EUROPE

CLIENT DRIVEN SOLUTIONS TO GROW YOUR BUSINESS

TUESDAY 6TH NOVEMBER 2007
HOTEL PRESIDENT WILSON • GENEVA

BENEFITS OF ATTENDING:

- Learn about the most effective **client acquisition strategies**
- Identify **ways of targeting** specific groups
- Build a **successful wealth management** practice
- Debate ways to hire and **retain the best staff** available
- Hear how to **achieve trusted advisor status** for your practice

CONFIRMED SPEAKERS INCLUDE:

- **Kristinn Kristinsson**, Head of Private Banking Geneva, **BANK SARASIN & CO LTD**
- **Michael Demirel**, Head of Private Bank and General Manager, **CITI PRIVATE BANK**
- **Pierre Bes**, Managing Director, Head of European Private Banking Coverage, **BARCLAYS CAPITAL**
- **Michael Maslinski**, Founding Partner, **MASLINSKI & CO LTD**
- **Bruce Weatherill**, Global Head-Wealth Management Practice, **PRICEWATERHOUSECOOPERS**
- **Marcus Hickman**, Founder, **DAVIES HICKMAN PARTNERS**
- **Chris Pickles**, Manager, Industry Relations, **BT GLOBAL FINANCIAL SERVICES**
- **Yuri Bender**, Editor-in-Chief, **PWM**
- **Bertrand Demole**, Head of Hedge Funds & Portfolio Manager, **PICTET FUNDS**
- **Seb Dovey**, Head of Consulting, **SCORPIO PARTNERSHIP**
- **Peter Sartogo**, Managing Partner and Member of the Advisory Board, **GLOBAL WEALTH MANAGEMENT**
- **Hans U. Howald**, **BELESTA AG**
- **Antony John**, Chief Executive Officer, **INVESTMENT MANAGER SELECTION LIMITED**
- **Horst Bennin**, Managing Director, **AUDA**
- **Jonathan Shaw**, Founder, **7 CITY LEARNING**
- **Gérard Felley**, Managing Director, International Private Banking Francophone Client Markets **CREDIT SUISSE**
- **Rhian-Anwen Hamill**, Partner, **RAH PARTNERS LLP**
- **John Zafiriou**, Managing Director, Private Banking & Investment Services & Products, **CREDIT SUISSE**

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SPEAKERS

KRISTINN KRISTINSSON, HEAD OF PRIVATE BANKING GENEVA, BANK SARASIN & CO LTD

 Kristinn was appointed Head of Private Banking Geneva at Bank Sarasin & Co. Ltd on 1 March 2007. He is responsible for the entire business with Swiss and international clients served out of the bank's Geneva location. As a new head of the Geneva office, he is also responsible for the operational management of this branch. Kristinn is a member of the management board of the Private & Institutional Clients Switzerland (PIC) division, which is headed by Eric G. Sarasin and Marco Weber. He has joined Bank Sarasin from Credit Suisse, where he was previously regional manager for Greece.

PIERRE BES, MANAGING DIRECTOR, HEAD OF EUROPEAN PRIVATE BANKING COVERAGE, BARCLAYS CAPITAL

 Pierre is a Managing Director and Head of Private Banking Coverage for Investor Solutions, Europe, at Barclays Capital based in London. Mr. Bes joined Barclays Capital in July 2006. Prior to this, he spent eight years at BNP Paribas where he successfully participated in setting up the structured products sales force. He held a variety of senior positions, most recently as Head of the Equity Structured Products sales team in the Benelux region and in Switzerland. Mr. Bes is a French and Swiss citizen. He holds degrees from HEC and the London Business School.


GÉRARD FELLEY, MANAGING DIRECTOR, INTERNATIONAL PRIVATE BANKING FRANCOPHONE CLIENT MARKETS, CREDIT SUISSE

Gérard Felley is responsible for international private banking with Francophone client markets, in his role as an MD with Credit Suisse. Having joined the bank in 1989, his current geographical area of responsibility includes France and North Africa. In his time with Credit Suisse, Gérard has covered a wide variety of roles across a number of European departments. He has studied at leading universities and institutes across the world.


MICHAEL MASLINSKI, FOUNDING PARTNER, MASLINSKI & CO LTD

 Michael is a director of Maslinski & Co Ltd, a London based strategy and marketing consultants specialising in the Private Banking and Wealth Management sector. Maslinski & Co has been recognised as the consultancy firm with the best understanding of the wealth management sector, in a survey of 40 European financial institutions, covering 11 different countries. Michael has advised a wide variety of institutions on the development of their services for private clients, ranging from major retail and investment banks, to wealth management boutiques and family offices.


BRUCE WEATHERILL, GLOBAL HEAD, WEALTH MANAGEMENT PRACTICE, PRICEWATERHOUSECOOPERS

 Bruce is Global Leader of PwC's Private Banking Practice and the author of the in-depth Global Private Banking / Wealth Management Survey which PwC has carried out for ten years. He works on special projects with the Boards of Private Banks internationally.

MARCUS HICKMAN, FOUNDER, DAVIES HICKMAN PARTNERS

 Davies specialises in client and consumer research, analysis and strategy, consulting to financial services and telecoms/media providers. With a base in London, Marcus has worked in financial services research for over 10 years, including projects for some of the world's largest providers of banking and investment products. A particular area of focus is that of the mass affluent and HNW market, where Davies Hickman has completed client research examining changing lifestyle trends and needs, including those related to communication with wealth managers and private banks. Marcus has post-graduate qualifications in economics and an MBA.


CHRIS PICKLES, MANAGER, INDUSTRY RELATIONS, BT GLOBAL FINANCIAL SERVICES

 Chris is Manager, Industry Relations for BT Global Financial Services. His role is ensuring that BT is fully aware of new challenges facing the financial services industry globally, and communicating its understanding of how these challenges, structural changes and new regulatory requirements impact their customers' businesses and their use of BT's services. Chris joined BT Radianz in June 2000, when Radianz was formed.

PETER SARTOGO, MANAGING PARTNER AND MEMBER OF THE ADVISORY BOARD, GLOBAL WEALTH MANAGEMENT

 Global Wealth Management is an International Multi-Family Office based in Geneva with operations in New York, London, Luxembourg, Milan and Rome. As of today the Firm manages Euro 1.8bn in assets. Previously Peter was a former Managing Director of Deutsche Bank, Global Equities in London for 5 years responsible for all Equity Cash, Derivatives and Structured Products for the Italian client base. Before joining Deutsche Bank Peter spent 7 years at Morgan Stanley, Institutional Equity Division in New York and London. Peter Sartogo holds a BA in Economics and Business Administration from Bocconi University of Milan.

ANTONY JOHN, CHIEF EXECUTIVE OFFICER, INVESTMENT MANAGER SELECTION LIMITED

 Antony is Chief Executive Officer and one of the five principal shareholders of IMS where he has been since 2003. Prior to this Antony was an Executive Vice President for five years at the private Swiss bank Lombard Odier Darier Hentsch with wide ranging responsibilities within the bank's European business. Antony enjoyed a 10 year spell at Hill Samuel Asset Management as Head of the Retail Business from 1988 – 1998. He is a member of several professional bodies and a Freeman of the City of London.


JONATHAN SHAW, FOUNDER, 7 CITY LEARNING

Jonathan graduated with an MA in Economics from Corpus Christi College, Cambridge University, and then began his career in the City as an emerging markets analyst, specialising in Eastern European markets. He subsequently ran a systems integration company delivering simulations for financial markets before becoming one of the founding members of 7city. At 7city, Jonathan is Head of Strategy & Business Planning and is responsible for the strategic direction of 7city, overseeing the development of new products and movement into new areas.

JOHN ZAFIRIOU, MANAGING DIRECTOR, PRIVATE BANKING & INVESTMENT SERVICES & PRODUCTS, CREDIT SUISSE

John is Managing Director and Head of Solution Partners in Credit Suisse Private Banking. Solution Partners, a group that deals with the complex financial needs of UHNW client base, was founded three years ago by John. They now have a global team of approximately 70 people. Until 2003 John was Managing Director of Credit Suisse First Boston and Head of European Fixed Income Coverage & Origination in the Fixed Income Division.

MICHAEL DEMIREL, HEAD OF PRIVATE BANK AND GENERAL MANAGER, CITI PRIVATE BANK

 Michael joined CPB Europe in January 2006 as a Strategic Consultant. He was then appointed General Manager of Citibank (Switzerland) in August 2006. Previously with UBS in New York, Mr. Demirel was Executive Director, UBS Wealth Management USA and responsible for New Business Development, M&A activity and devising a UHNW focus. Before that, Mr. Demirel spent six years with Goldman Sachs in New York, where he started his career in investment banking. Mr Demirel graduated from Queens College, New York with an MA in Quantitative Economics and holds a number of Honors and Distinguished Service Awards.