



**University of  
Zurich** <sup>UZH</sup>  
Department of Finance

**CSP** Center for Sustainable  
Finance & Private Wealth

## Program: Learning from Leading Impact Family Offices



**Deep-dive** into how experienced impact-oriented  
principals and family office managers operate.

Suitable for both **beginners and experts** looking to  
operationalise impact in their own structures.

May 15-17, 2024

In collaboration with impact-forward Single Family Office  
VP Capital.



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**CSP** Center for Sustainable  
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# Learning from leading impact family offices

This unique program empowers private wealth holders to understand how others – sometimes very differently positioned – wealth holders think and structure their processes to run an Impact Oriented Family Office.

## Key aspects about the program:

- Focus: Strictly taking the perspective of wealth holders & family office managers
- Format: Fully interactive with deep discussions, answering the questions of all participants
- Cases: Impact-leading wealth holders or family office executives sharing openly & in detail about their own setups
- Setting: Protected environment free of conflicts of interest (strictly non-solicitation) and all discussions under Chatham house rules
- Cohort: An intimate setting of families, available upon invitation only

## Setup of the 2024 cohort:

- People: Cohort-size capped at 15 families represented by Principals and senior Family Office staff
- Collaborator: VP Capital, the leading Dutch/Belgian single family office with a strong focus on positive impact
- Place: Zurich, Switzerland
- Price & Date: May 15-17; program fee of CHF 4.800 per person or CHF 9.800 for three representing the same family/Family office
- Host: CSP is part of the Department of Finance of University of Zurich.

We will be happy to explore a potential participation in a personal conversation. Reference-calls with past participants are possible. Please contact [Francesca.Spoerry@bf.uzh.ch](mailto:Francesca.Spoerry@bf.uzh.ch).



A handwritten signature in black ink that reads "F. Paetzold".

**Dr. Falko Paetzold**

Managing Director, Center for Sustainable Finance and Private Wealth (CSP), Department of Finance, University of Zurich



A handwritten signature in black ink that reads "F. Spoerry".

**Francesca Spoerry**

Head of Trainings, Center for Sustainable Finance and Private Wealth (CSP), Department of Finance, University of Zurich

# Day 1, Wednesday May 15, 2024: Setting the stage. Core principles. Impact across Asset Classes.

Note: Optional Welcome Dinner, Tuesday May 14, 2024

Intro	Program flow
Morning 9-12	<p>Welcome Group Agreement Getting to know each other Unconference format to explore everyone’s key topics and first answers</p> <p>Dr. Falko Paetzold, Program-initiator &amp; host</p>
Lunch	
Afternoon 2-5	<p>Principal Case 1:</p> <p>How we implement having impact across asset classes: Fixed income, Cash/cash equivalents, PE/VC, Public equities, Infrastructure, Real Estate, Direct equity/Debt</p> <p>Guus van Puijenbroek and Astrid Leyssens, VP Capital - Single Family Office</p>
Group & Faculty dinner	



# Day 2, Thursday May 16, 2024 :

## Embedding impact – governance; (Impact) portfolio construction and measurement; building an impact-team.

Recap	Recapping day 1 & Intro to day 2
Morning 9-12	<p>Framework 2:</p> <p>Embedding impact within the family office – how owner families can build impact into governance, family, and culture.</p> <p>Prof. Dr. Matthias Waldkirch, EBS University</p>
Lunch	
Afternoon 2-5	<p>Principal Case 2:</p> <p>Our processes &amp; portfolio: How we develop a strategic impact asset allocation and operate an impact-minded single family office from front to back.</p> <p>Moritz Kortekangas, Imladris – Single family office</p>
Group & Faculty dinner & drinks, Launch of the new CSP “Investor’s Guide to B. Corp” with the wider local wealth holder community	





# Day 3, Friday May 17, 2024 :

## Impact strategy across all assets and (Impact) due diligence

Recap	Recapping day 2 and setting the scene for day 3
Morning 9-12	<p><b>Principal Case 3:</b></p> <p><b>Investing for Impact: How our SFO takes a total portfolio approach to impact, leveraging our unique resources (wealth, knowledge, influence, time) and impact tools (investing, philanthropy, advocacy and ecosystem engagement).</b></p> <p>Robert Boogaard, PCG Investments – Single Family Office</p>
Lunch	
Afternoon 2-5	<p><b>Principal Case 4:</b></p> <p><b>How we developed an Impact Measurement Methodology for our Portfolio Impact FO's: their role in the ecosystem; networks, advisors, concrete next steps</b></p> <p>Guus van Puijenbroek and Astrid Leyssens, VP Capital – Single Family Office</p>
Closing	Discussion concluding the program & defining your own next steps



# What do our alumni say?

**Naiana, 2021 cohort:**

“The course laid a solid foundation for understanding different family governance structures and provided a clear path forward on what the best options are. I was inspired by the speakers!”





## More Information and Registration

In case you are interested in the program, we will be happy to explore a potential participation in a personal conversation.

Please contact [Francesca.Spoerry@df.uzh.ch](mailto:Francesca.Spoerry@df.uzh.ch) or [Falko.Paetzold@df.uzh.ch](mailto:Falko.Paetzold@df.uzh.ch)