



**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, at University of Zurich, Switzerland

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



University of  
Zurich <sup>UZH</sup>



# 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 university 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: University of Zurich, Switzerland
- Price & Date: May 15-17; program fee of EUR 4.800 per person or EUR 9.800 for three representing people the same family/Family office
- Hosts: CSP is part of the Department of Finance of state-owned University of Zurich. Single Family office VP Capital kindly shares its impact-experiences deeply and back-stops potential financial losses of this program for CSP as part of its impact-strategy.

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).



*F Paetzold*

**Dr. Falko Paetzold**

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



*F. Spoerry*

**Francesca Spoerry**  
Head of Trainings, CSP

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

Intro

Program flow

Morning 9-12

Welcome  
Group Agreement  
Getting to know each other  
Unconference format to explore everyone's key topics and first answers

Dr. Falko Paetzold, Program-initiator & host, CSP, University of Zurich



Lunch

Afternoon 2-5

Principal Case 1:

How we implement having impact across asset classes: Fixed income, Cash/cash equivalents, PE/VC, Public equities, Infrastructure, Real Estate, Direct equity/Debt

Guus van Puijenbroek and Astrid Leyssens, VP Capital - Single Family Office



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

Framework 2:

Embedding impact within the family office – how owner families can build impact into governance, family, and culture.

Prof. Dr. Matthias Waldkirch, EBS University



Lunch

Afternoon 2-5

Principal Case 2:

Our processes & portfolio: How we develop a strategic impact asset allocation and operate an impact-minded single family office from front to back.

Moritz Kortekangas, Imladris – Single family office



Group & Faculty dinner drinks, Launch of the new CSP “Investor’s Guide to B. Corp” (tbc)

# 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	<b>Principal Case 3:</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). Robert Boogaard, PCG Investments – Single Family Office
Lunch	
Afternoon 2-5	<b>Principal Case 4:</b>  How we developed an Impact Measurement Methodology for our Portfolio Impact FO's: their role in the ecosystem; networks, advisors, concrete next steps Guus van Puijenbroek and Astrid Leyssens, VP Capital – Single Family Office
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)