Universität Zürich[UZH]
Department of Finance

CSP Center for Sustainable Finance & Private Wealth

How Leading Family Offices Grow Future-Fit with Impact

From Concept to Implementation

Deep-dive into how experienced impact-oriented principals and family office managers operate. Suitable for both beginners and experts looking to operationalize impact in their own structures to mitigate future risk.

June 23-25, 2025

In collaboration with impact-forward single family office VP Capital

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I attended the course with my two daughters. The course was perfect in providing us guidance and direction on managing our impact-focused family office. The program provided a great mix of examples and frameworks. We loved hearing the stories from others in a similar situation to us, in an informal and very welcoming format. The connections with, and candid sharing of experience of, other attendees and faculty were even more valuable!

Edmond Hilhorst
Family office principal
Course participant

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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!

Naiana Miranda
Next Gen investor
Course participant

Program Team

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

Marietta Chatzinota
Family Office Training Program Lead, Center for Sustainable Finance and Private Wealth (CSP),
Department of Finance,
University of Zurich

Learning from leading impact family offices

This unique program empowers private wealth holders to understand how other—sometimes very differently positioned—wealth holders think and structure their processes to build and run future-fit family offices.

Key aspects of the program:

- **Focus:** Strictly taking the perspective of wealth holders and 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 and in detail about their own setups
- **Setting:** Protected environment free of conflicts of interest (strictly non-solicitation) and all discussions under Chatham House Rule
- **Cohort:** An intimate setting of families, upon invitation only

Setup of the 2025 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
- **Date:** June 23-25, 2025
- **Fee:** CHF 4,920 / EUR 5,280 per person or CHF 9,970 / EUR 10,700 for three people of the same family or family office
- **Host:** Center for Sustainable Finance and Private Wealth, University of Zurich

Registrations

- Reach out to Marietta Chatzinota at marietta.chatzinota@df.uzh.ch to learn more and apply
- We would be happy to discuss potential participation in a one-on-one conversation
- We can also arrange reference calls with past participants

Course Content

INTRO

Unconference and ecosystem gathering to explore everyone's key topics and provide first answers to what it means to be a future-fit family

Moderated by Dr. Falko Paetzold, Program Initiator and Host

RESEARCH SEGMENTS

Wealth management industry analysis: Results of the 2025 market analysis of 17 private banks, multi-family offices, and specialist advisors, in the U.S. and Europe. How wealth managers are integrating impact into their products and services.

Andrew Douglas, CFA, Lead CSP Author "Investor's Guide to Impact Wealth Management"

Dr. Falko Paetzold, Program Initiator and Host

> I thoroughly enjoyed and learned from the course at CSP. As a Next Gen in our family it is very useful to connect and discuss with peers in similar situations. The cases provided and group discussions helped me further shape my understanding of impact investing, in either new businesses or legacy operations. I look forward to staying an active member in the alumni environment offered by CSP, to continue learning and sharing insights.
>
> **Stephan**
> Next Gen investor
> Course participant

CASE STUDIES

01.

Sharing their impact journey: onboarding family and team, impact in different asset classes, developing impact dealflow, external communication, impact metrics, impact screening, latest impact trends, discussing hurdles encountered when going into impact


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

02.

Processes and portfolio: How a single family office developed a strategic impact asset allocation and operationalized an impact-minded single family office from front to back

Moritz Kortekangas, Imladris – Single Family Office

03.

Investing for Impact: How a single family office takes a total portfolio approach to impact, levering unique resources (wealth, knowledge, influence, time) and impact tools (investing, philanthropy, advocacy, ecosystem engagement)

Robert Boogaard, PCG Investments – Single Family Office

04.

How to develop an Impact Measurement Methodology


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

LEARNING FROM PEERS

What next for people in the room including finding advisors, networks, and staff to support

Moderated by Dr. Falko Paetzold, Program Initiator and Host

Information

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Location: Zurich, Switzerland

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Interested?

Reach out to Marietta Chatzinota at
marietta.chatzinota@df.uzh.ch
to learn more and apply.

Attributions

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There is a lot one can read about impact and investments, however, learning from other families how they are walking their unique path of impact investment, with its ups and downs, struggles, and changes over the years, gave us the courage to take our first steps without having figured it all out. The high-level knowledge and insights that the CSP team members added offered an insightful theoretical framework. The balance between the practice and theory created an inspiring and deep learning experience for both our advisor and myself.

Anonymous female
Family office principal
Course participant

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