



University of
Zurich ^{UZH}

CSP Center for Sustainable
Finance & Private Wealth

Sustainable Investing in Wealth Management

7th Cohort
February 2nd and 3rd
2023
Online

Log In Details

<https://uzh.zoom.us/j/2833311605?pwd=NXU1SFZsVHptQWhBY0NmcmFIVyYtvQT09>

Meeting-ID: 283 331 1605

Passcode: Will be sent prior to the session.

Logistics

For billing questions, reach out to
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Preparation

The Investor's Guide to Impact:

[Evidence-based advice for investors who want to change the world](#)

Private Banking Report:

[Sustainable Investing Capabilities in Private Banks 2022](#)

Swiss Sustainable Finance/ Centre for Sustainable Finance and Private

Wealth Market study:

[Swiss Sustainable Investment market study 2022](#)

Ten Ingredients for Impact Investing:

[Eight Families Share their Recipes](#)

Program*

1st Day

Thursday, February 2nd, 9.00-17.00 (CET)

09:00-09:30 Meeting your cohort

What is CSP? Why you are here and how we will have an impact together.

[Francesca Spoerry](#), Head of Trainings and Outreach, CSP

09:30-10.30 Sustainable development and the role of finance

We have seven years to reach the United Nations Sustainable Development Goals. Why is the financial industry at the center of all of this?

[Emilie Goodall](#), Director, Sustainable Investing, Fidelity International and Forum for the Future Affiliate

10:50-11:50 Bringing sustainable investing to the discussion table

An overview of key definitions, frameworks, and approaches to help map various investment products and their impact.

[Prof. Dr. Falko Paetzold](#), Initiator and Managing Director of CSP and Professor of Social Finance at EBS Business School in Germany

12:00-12:15 Understanding the impact of investing

What is impact investing, how to have impact, and how to maximize real-world impact.

[Francesca Spoerry](#), Head of Trainings and Outreach, CSP

12:15-12:45 Sustainable investment in the client advisory process

Understand the requirements for recording and matching client's sustainability with your organization's sustainable investment products and solutions.

[Andrew Douglas, CFA](#), Institutional Program Manager, CSP

13:45-14:45 Building a sustainable portfolio

What are the various products and asset classes suitable to different types of sustainable investors.

[Andrew Douglas, CFA](#), Institutional Program Manager, CSP

15.00-16.00 TBC

TBC: In a discursive based session, Florian will share an array of the relevant academic research on Sustainable investment, and advise how this is relevant to wealth managers. This includes the impact of ESG ratings on fund inclusion, whether (U)HNWI pay more for sustainable funds and which levels of evidence exist for different types of sustainable investment strategies.

[Florian Heeb](#), Postdoc Associate, MIT Sloan

16:00-17.00 Climate Investing

A overview of the different tools and approaches for climate investing across asset classes

[Carlota Garcia-Manas](#), Head of Climate Transition and ESG Engagement, Royal London Asset Management

Program*

2nd Day

Friday, February^{3rd}, 9.00-18.00 (CET)

Optional in person networking drinks: 6.30pm-8.30pm (Central Zurich: Location TBC)

09:00-09:50 Everything you always wanted to know about ESG

Can ESG integration have real word impact? What are the trade offs? What is materiality? What are the 10 questions to ask the manager of an ESG Fund?

[Harald Walkate](#), CSP Fellow

10:00-10:50 A deep-dive into the ecosystem

A discussion about past, present and future of ESG – what are our ESG and impact goals, where are we in terms of reaching them, and what are the ESG topics & tools that are rising to the agenda in 2023.

[Harald Walkate](#), CSP Fellow

11:20-12:00: Impact Measurement and Active Ownership

How to assess the impact of funds, and how active ownership can be practiced successfully.

[Dr. James Gifford](#), Head of Sustainable and Impact Advisory at Credit Suisse

13:15-14:15: Impact Funds at banks

In a discursive based session, leading private banks will discuss the practicalities, opportunities and challenges of getting private market impact funds onto banking platforms.

[Dr. James Gifford](#), Head of Sustainable and Impact Advisory at Credit Suisse

[Antonia Sariyska](#), Sustainable and impact investing at UBS

[Maddalena Orlandini](#), Deputy Head Private Markets & Impact Funds Specialist at Julius Baer

14:15-15:00: Sustainable Investment Regulation

Why are regulators taking action, what are they doing and what real-world impact is this having? This includes an overview of relevant regulation from across the world, including SFDR, NFRD, EU Taxonomy and MIFID II.

[Nuria Fernandez Oms](#), Legal Expert, ECOFACT

[Olivier Jaeggi](#), Managing director, ECOFACT

15:20-16:10: Navigating Greenwashing risk

How do the sustainable finance regulations define greenwashing and why do regulators pay increasing attention to the topic? What are the practices with high greenwashing risk and how to avoid them?

[Dr. Tadas Zukas](#), Global Lead Sr. Legal Counsel Sustainability/ESG at Vontobel

16:15-17:30: Why we care: HNW impact investor and advisor experience-sharing

What does sustainable investing look like from the investor's point of view and what do (U)HNWIs need in order to embark on a journey toward investing with impact.

17:30-18:00 Wrap-up

*Program Subject to change