



University of
Zurich^{UZH}

CSP Center for Sustainable
Finance & Private Wealth



Spreading our Wings

Activity Report

2021 – 2022

Table of Contents

Intro	3
The Who, What, Why and How of CSP	4
Research <i>From questions to knowledge</i>	6
Train <i>From knowledge to action</i>	10
Engage <i>From action to change</i>	17
What is The Meaning of Our Work?	20
Who Makes This Happen?	22
Organizations We Collaborate With	23



Falko Paetzold, Initiator and Managing Director of CSP, presenting our research results at the 2021 annual conference of the Swiss Association of Wealth Managers.

“The sheer magnitude of leverage that CSP has for positive impact is outstanding. Both in absolute terms and relative to many other initiatives. We look forward to continuing and deepening our collaboration.”



Thomas Vellacott
CEO, WWF Switzerland



Why this cover?

We chose this picture as a symbol for the year 2021: the year in which we prepared to elevate our work to the next level and to take off to fly as a group, bringing our research and programs to new regions and audiences. The three birds signify the three CSP entities: CSP in Zurich, CSP Singapore, which was incorporated in October 2021, and coming soon: CSP in the US.

Spreading Our Wings

“It Works”: That was the core message of our last Activity Report 2020-2021. From 2017 to 2020, we demonstrated the outsized impact of our approach: researching the key topics in sustainable finance and connecting the findings directly to ultra-high net worth individuals, bankers and regulators. We concluded that it is time to scale our work from 2021 onwards.

“Spreading our Wings”: That is what the year 2021 was about, and what we cover in this 2021-2022 Activity Report: we have taken our work to the next level. Like a flock of birds, we expanded and grouped our forces, spread our wings and took off – off to bring our knowledge and skills to new geographies and new audiences, with more profound depth.

You can see this in our three pillars:

- **Research** - Our paper on how investors can have impact in the real world became the number one most read paper in the academic journal where it was published. Our research continued winning academic awards and being cited by regulators globally, as well as media outlets ranging from The Wall Street Journal to Fortune to NZZ. Going forward, we are focusing our work on investor impact by launching a bold, five-year “Evidence for Impact” research program.
- **Training** - We piloted three new, highly-targeted training programs for wealth owners in 2021. The programs proved to be successful and will be delivered to larger audiences in 2022.

Meanwhile, we have refined and deepened existing flagship programs and are responding to the unprecedented demand to train bankers in sustainable investing, which has enabled us to employ our first Institutional Programs Manager.

- **Engagement** - With a new Community & Partnerships Manager on board, we are reconnecting with all of our 160 wealth owner alumni individually to accelerate their impact journey and to strengthen our partnerships so

“We spread our wings and have taken off to drive impact in new geographies, with new audiences, with a bigger reach and more profound depth.”

we can jointly mobilize more capital for impact faster. In so doing, we are leveraging the strength of operating together, like birds in a flock travelling long distances.

And you can see it in our **organization:**

In 2021 we strategically scaled our governance by establishing a **Management Team** and incorporating a **Steering Committee** to oversee the implementation of our strategy.

We **expanded our Core Team** by hiring three new roles: the first one is focused on the IRI/CSP Impact Investing for the Next Generation Program, the program we run in collaboration with the Initiative for Responsible Investment at the Harvard Kennedy School. The second new role is focused on institutional programs and the third is dedicated to community and partnerships.

Additionally, we **scaled geographically:** CSP Singapore was incorporated in October 2021 to bring sustainable finance to a higher and broader level in Asia, and we will establish a CSP entity on the US West Coast in 2022.

With this bigger and bolder approach, we are flying higher and faster, scaling our efforts strategically and boosting our goal of establishing a global powerhouse of impact. Fortunately, sustainable finance is becoming mainstream, but there is yet a long distance to fly: there are still crucial knowledge gaps to fill and extensive research insights to be developed, which need to then be brought to wealth owners and wealth managers. We are on it - and we would like to thank everyone who believes in our work, supports us and flies with us on this journey. Towards impact!



Prof. Dr. Falko Paetzold

Assistant Professor in Social Finance at EBS University (Oestrich-Winkel)
Initiator and Managing Director of CSP

The Who, What, Why and How of CSP



CSP, the Center for Sustainable Finance and Private Wealth, is an academic research and teaching institution at the Department of Banking and Finance at the University of Zurich. CSP is globally unique in its position at the intersection of research and training. We strategically and systematically research the key questions in sustainable finance and publish them not only in top-notch academic journals but also go the extra mile to inform the key decision makers in our economy. The goal is to generate knowledge and to mobilize capital toward impact.



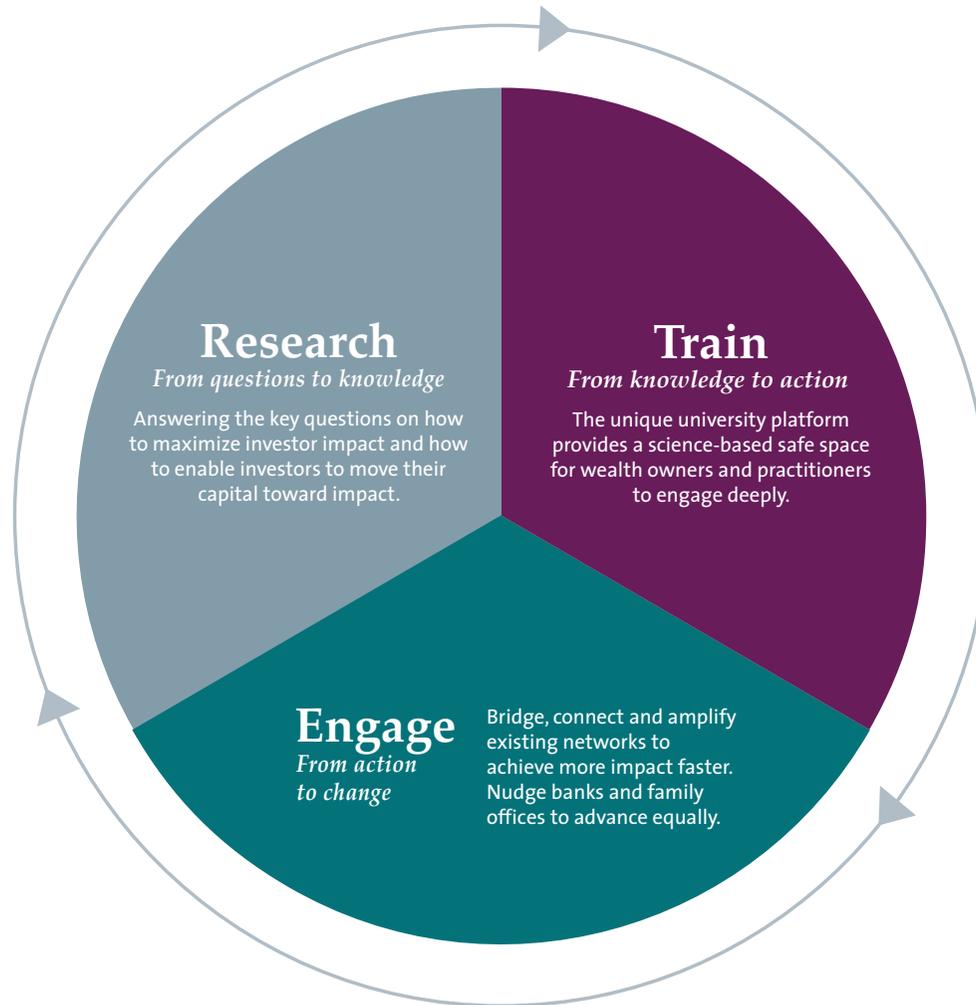
CSP's mission

is to drive research and mobilize private wealth to achieve the targets set by the United Nations Sustainable Development Agenda 2030 and to limit global warming to 1.5 degrees Celsius.



CSP's vision

is that scientifically robust evidence enables the entire portfolio of every wealth owner to fully advance sustainable development.



CSP's work can be divided into three streams:

Our **research** provides answers to how investors can have real impact and to what makes investors choose to invest for impact. Our **trainings**

enable investors and wealth managers, as key actors in capitalism, to drive positive change. Our **engagement** with our alumni and partners support a strong ecosystem that can achieve more, faster.

Manifesto of the CSP alumni community of high net worth investors

What does the community of wealth owners that engage with CSPs research stand for? As a response, alum Fernando Scodro developed the CSP Wealth Owner Alumni Manifesto together with the alumni community in 2021:

As we witness the collapse of our natural systems and structures upholding social justice erode, we recognize the urgency to act and our ability to do so.

We believe in the responsibility of private wealth to address humanity's challenges. We invest with purpose and rely on scientific research to maximize our positive impact.

As part of the CSP community we challenge how capital is allocated and we are challenged to redefine returns beyond economic metrics. We take responsibility for what we own and we push others to do the same.

Research

From questions to knowledge



Florian Heeb, PhD researcher at CSP, presenting our work.

As a university unit, we generate fundamental knowledge on bottlenecks and knowledge gaps in sustainable and impact investing. We work to answer the key questions on how to maximize investor impact and how to enable investors to move their capital toward impact in an effective way.

“There is so much excitement around impact investing, so much readiness to do something meaningful. Our goal is to channel that excitement towards mechanisms that are really effective in making a difference. To do that, we accumulate knowledge on what works and what doesn’t work.”



Dr. Julian Kölbel

Head of Research at CSP
Research Affiliate at MIT Sloan
BMW Foundation Herbert Quandt
Research Fellow

We continue to draw success from the research paper published in 2020 “Can Sustainable Investing Save the World?”. In November 2021, it was announced to be the **number 1 most read paper** in the academic, peer-reviewed journal “Organization & Environment”. Our successful “Investor’s Guide to Impact”, which was based on the research paper, is widely read and quoted, for example, in a high-level report by the Swiss Federal Government and in the annual Report of the European Sustainable Investment Forum (EUROSIF).

Thus, the fact that the concept of impact is now at the center of discussions around sustainable finance is arguably a result of our work and **places CSP at the center of these discussions**. The recognition of our research findings also indicates that academic research complemented with publications that are accessible for practitioners, is the way to move the needle with our research efforts.

In 2021, we published six academic papers, mainly focused on why investors invest sustainably (and why not) and how to better manage and measure impact. In a new working paper titled “Do Investors Care About Impact?”, we demonstrate experimentally that, while investors really care about impact, they rely on emotions rather than calculations when making investment decisions. This finding has implications for how to market products, so that investors feel good about their investment decisions while having impact.

We also made progress on “The Aggregate Confusion Project” in collaboration with MIT Sloan, which focuses on solutions for the divergence between the different ESG rating systems. One paper is under review, and we published another working paper online.



Dr. Julian Kölbel

Head of Research at CSP
Research Affiliate at MIT Sloan
BMW Foundation Herbert Quandt
Research Fellow



Florian Heeb

PhD Researcher



Taeun Kwon

PhD Researcher; Blended Finance
Research Lead



Anne Kellers

PhD Researcher; Wealth Manager
Program Lead

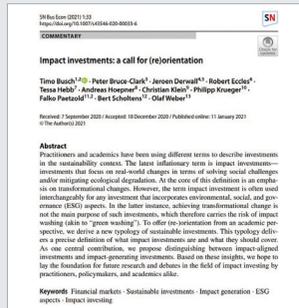


Linda Isabella Hain

PhD Researcher



Examples of practitioner's reports published in 2021

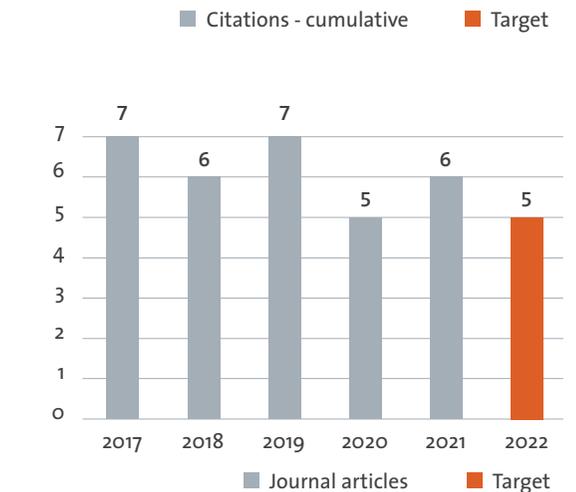
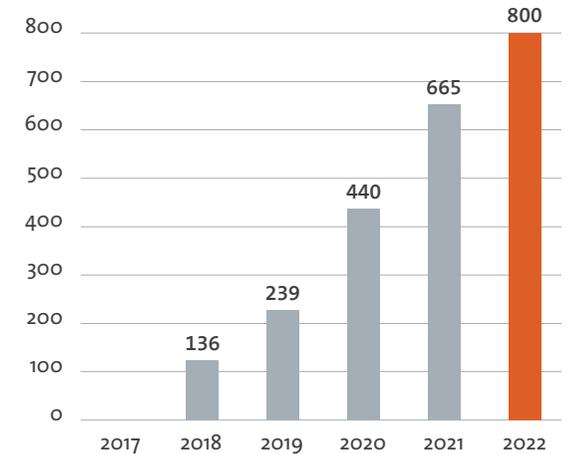


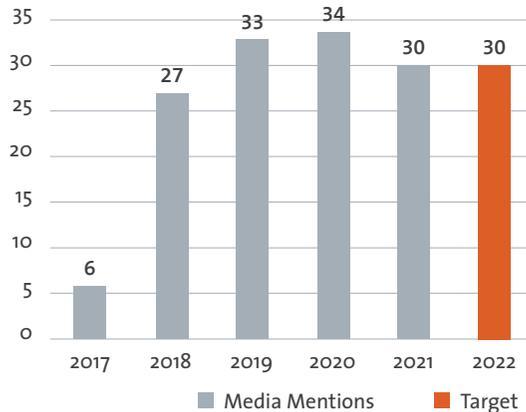
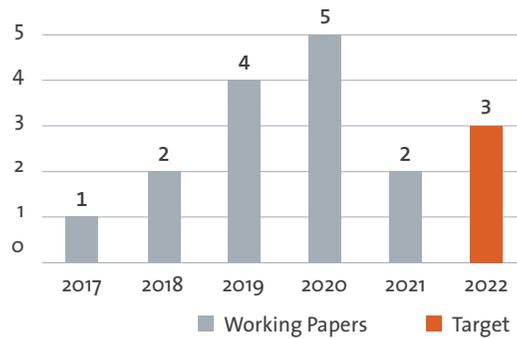
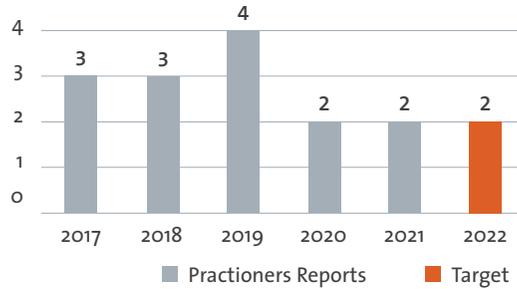
Examples of CSP research papers published in 2021



Our research outputs

In recent years, we have focused on fewer publications with more impact for our research and practitioner's papers.





Focus for 2022

Launch of a multi-year research program: “Evidence for Impact”

Achieving impact as an investor is complex, and there is a scarcity of evidence that hinders good decisions. We see an opportunity to fly higher, to strategically scale our research impact, and to support investors across asset classes with our findings, by **launching a bold and profound multi-year research program in 2022.**

This is a program focused on closing the knowledge gaps and debunking myths around the evidence of impact, like: What is the real-

world impact of ESG? How are engagement skills assessed? What could be a universal metric to indicate potential impact of investments? How cost-effective are impact products?

The outcomes of this five-year program will be **academic papers and reports & tools for investors**, helping them to make decisions and achieve the impact they want to have in the world.

Hosting the world’s largest sustainable finance research conference: GRASFI



2022 will also be an important year for our international reputation within academia as **the host of GRASFI**, the annual Global Research Alliance for Sustainable Finance and Investment Conference, which is the world’s largest and most significant research conference in sustainable finance.

Training

From knowledge to action



In 2021 we launched three new programs for wealth owners, including a program for self-made wealth owners in partnership with the Katapult Foundation and the BWM Foundation Herbert Quandt.

CSP delivers training to those who have the opportunity to pull levers for impact through investing: private wealth owners and intermediaries. In addition, we bridge the gap between private and public funds with our program on blended finance, to make impact mainstream across institutions. Our science-based knowledge and secure environment for investors and advisors enable them to establish themselves as impact agents.

Three New Wealth Owner Programs Launched

Like birds flocking together to fly further and faster, we teamed up with partners, spread our wings and piloted three new wealth owner programs in 2021.

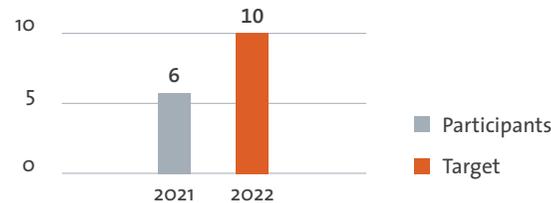
The first program we piloted was our program for successful entrepreneurs from the tech space who have had a recent liquidity event and want to deploy their capital towards impact. The six-month, three-module pilot was co-created with the participants and was run together with program partners Katapult Foundation and BMW Foundation Herbert Quandt.



Erin Duddy
Accelerate: The Impact Investing Program for Entrepreneurs - Program Manager

The program used a human-centered design to deliver fast-paced, bespoke learning approaches that moved participants from entrepreneur to impact investor over a short span of time. The pilot proved to be a success with a 100% satisfaction rate, and we found that an accelerator tailored towards self-made wealth owners is a gap that we can fill in the impact investing training space.

Accelerate: The Impact Investing Program for Entrepreneurs (Accelerate)
Program for Self-made Wealth Holders




Focus for 2022

We will expand the program in a more inclusive way under the name **Accelerate: The Impact Investing Program for Entrepreneurs**. The program is targeted towards a diverse group of change-driven, self-made wealth owners, ready to impact global challenges in innovative ways. We are aiming for a cohort of 10 participants for the 2022 program. From 2022 onwards, the program will be managed out of Silicon Valley.

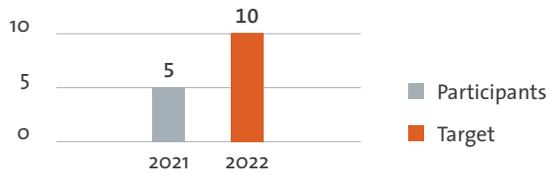
Secondly, we kicked off the **Wealth Management for Wealth Owners** program, a training program focused on the fundamentals of finance and wealth management, and on how to structure an impact-focused family office. This two-day course was run out of EBS Universität in Germany, where CSP's Managing Director Falko Paetzold holds an Assistant Professor position.



Dr. Falko Paetzold
Wealth Management for Wealth Owners Program Manager

The course, a collaboration between CSP, The Impact and Toniic, was strategically timed before the Zurich module of the IRI/CSP Impact Investing for the Next Generation program, as foundational preparation for NextGens. The program was a big success, with four of the five participants going on to take part in the IRI/CSP program, feeling more prepared, knowing the wealth management fundamentals.

Wealth Management for Wealth Owners (WMWO)
Program for NextGen Inheritors



Focus for 2022

We will support this program again as an optional foundational course prior to the IRI/CSP program. The next iteration will deepen the focus on finance and wealth management fundamentals, expand on the curriculum being taught by other wealth owners, and will aim for a cohort of 10 participants.

Our third new stream to disseminate research insights is the **Impact Investing and Leadership Program (Asia)**, a workshop for NextGens run in collaboration with the Sustainable Finance Initiative, an investor network in Hong Kong, and Professor Marshall Ganz of the Harvard Kennedy School.

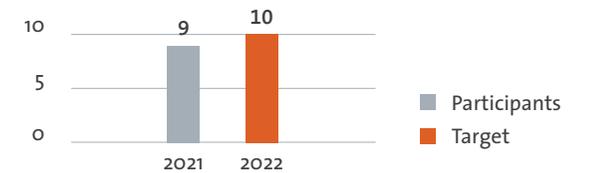


Huey Ko Siew
 CSP Fellow and Asian Leadership and Impact Investment Program Lead



The three-module pilot trained wealth owners in Hong Kong and Asia, more broadly, on building a strong narrative around impact investing to advance the theme within their own families and wealth owner communities.

Impact Investing and Leadership Program (Asia) (IILP)
Program for NextGen Inheritors in Asia





Focus for 2022

We will run this format again in 2022, and are exploring the integration of substantial train-the-trainer / coach-the-coach elements, wherein alumni train incoming high-net worth participants, thus empowering and upskilling alumni and providing a deeper learning experience for participants.

In 2021, our **IRI/CSP Impact Investing for the Next Generation flagship program** welcomed 19 new alumni ('20-'21 cohort) and a new cohort ('21-'22) of 22 participants into our community of impact-

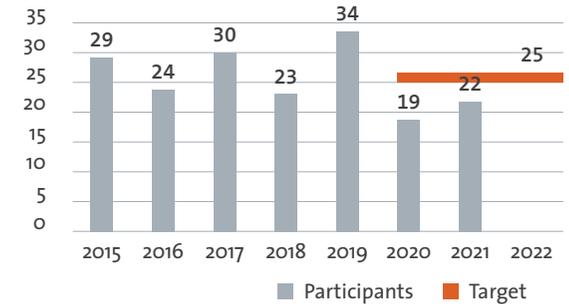
driven ultra-high net worth investors. In October '21, we resumed in-person teaching in Zurich, utilizing our learnings and digital content from the past year of highly-refined and interactive online delivery.



With Marietta Chatzinota as the first-ever full-time program lead on board for this key program, we have been introducing new, highly effective content and program features. This includes a mentoring scheme, where each current participant is supported by a mentor, who is part of our alumni

community. Feedback from mentors and mentees has been very positive so far and both groups have reported added value through connecting with peers and sharing experiences and learnings.

IRI/CSP Impact Investing for the Next Generation (IRI/CSP) Program for NextGen Inheritors



In 2019 we came to the conclusion that the ideal group size is rather 25 than 30+. This has been our target since, although COVID circumstances make it challenging to reach.

Focus for 2022

We will continue running our flagship program, aiming to work closely with 25 driven individuals from across the globe in the '22-'23 cohort, and to introduce curated content and frameworks on topics such as Investment Policy Statements, ESG data and impact measurement, and social justice.

High Demand for Wealth Manager Programs

We see that financial institutions are substantially accelerating their progress towards embracing sustainable finance. This is done through developing innovative sustainable investment products and committing to strong sustainability targets.

Yet, client-facing staff are still lagging in their ability to communicate the merits of these products and effectively embed their clients' sustainability goals into their portfolios. As a result, we have seen a significant uptick in demand for bringing CSP's research insights into practice and, as a result, have created a new Institutional Programs Manager role. Since September 2021, Andrew Douglas has strategically engaged with financial institutions to support them to train their staff and clients through the Sustainable Investing for Wealth Managers program and in-house workshops.



Andrew Douglas
Institutional Programs Manager

From CSP's perspective, this is an exciting development, as supporting entire institutions with management buy-in has transformational effects at the institutional level. This leads to our research having a greater impact by helping to further the financial industry's progress on sustainable investing and unlocking capital for impactful purposes.



Focus for 2022

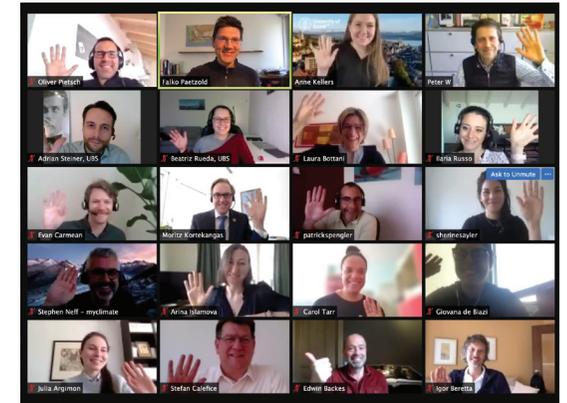
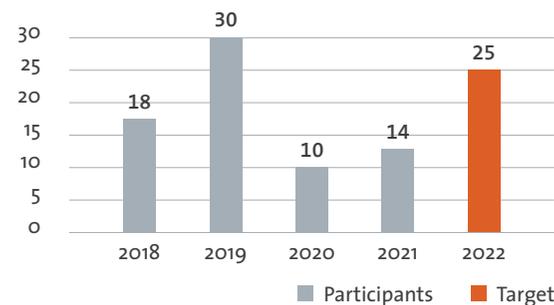
We expect an increased number of custom in-house workshops to be run for financial institutions in Europe and Singapore.



Anne Kellers
Sustainable Investing in Wealth Management Program Lead

The Sustainable Investing for Wealth Managers two-day program for client advisors working in private banks and family offices, was successfully run online and the program will be held again in 2022 (6th program iteration).

Sustainable Investing in Wealth Management (SIWM)
Program for Wealth Managers and Advisors



Due to Covid, our Wealth Managers program was run successfully online in April 2021.

Bridging the gap between Public and Private Funds

Organized by the Initiative for Blended Finance, with program partners CSP, Convergence, and Roots of Impact, the **Impact Investment & Blended Finance executive education program (IIBF)** is designed for participants to actively learn how to maximize the impact of their grants or investments in order to finance the Sustainable Development Goals.



Rebecca Storbeck Trubac
Impact Investing & Blended Finance Program Manager

After an unfortunate cancellation in 2020 due to Covid restrictions, IIBF welcomed 23 professionals

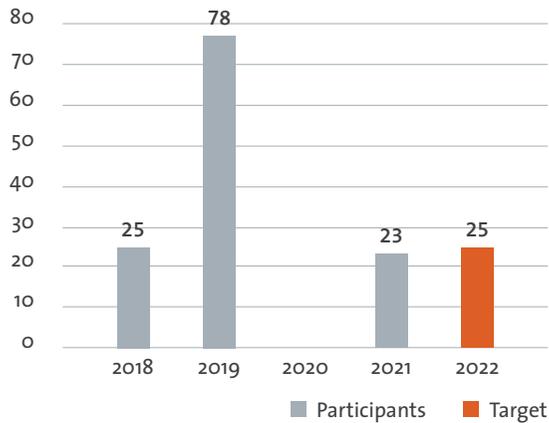
from a wide range of development agencies, foundations, and public organizations in 2021. Participants were highly satisfied with their learnings and the program team reported that this was the most successful iteration to date.



Focus for 2022

Recruiting is in full-swing for the next iteration. Planned on September 7-9, we are aiming to train 25-30 impact-minded participants.

Impact Investment & Blended Finance (IIBF)
Program for Managers of Development Agencies



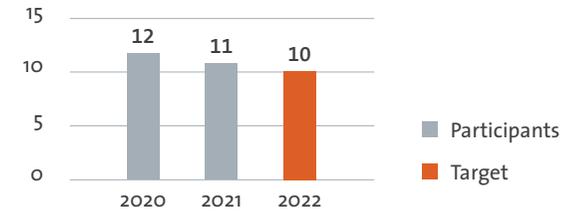
In 2019 we had many more participants than usual, due to several in-house iterations that we ran for the United Nations.



Inner change leads to outer change

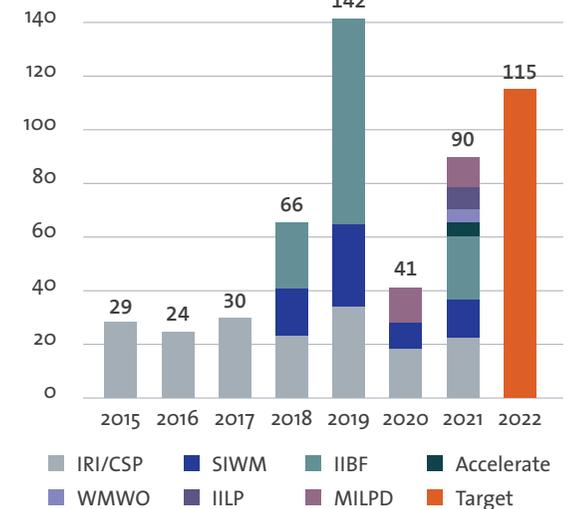
The second iteration of the **My Impactful Life Personal Development Program** has been a success. Eleven NextGens worked on letting their inner self shine, overcame personal hurdles, uncovered limiting beliefs, integrated purpose into their actions and gained clarity on the impact they want to have. The participant feedback has been very positive and we aim to support ten investors annually.

My Impactful Life Personal Development Program (MILPD)
Program for NextGen Inheritors



Britta Gruenig
CSP Fellow and Personal Development Program Lead

Participants of all Programs



CSP at the University of Zurich

CSP continued to be a solid contributor to the sustainable finance education offered by UZH through the Business, Economics & Informatics Faculty and the Center of Competence for Sustainable Finance (CCSF). Launched in 2020 with the CSP as the driving force, this center has developed into a strong entity. This organization serves as the umbrella under which the faculty's programs for students and financial professionals are organized.



University Teaching

CSP continued to offer the Research Seminar in Sustainable Finance in the 2021 fall semester. This seminar, which was also offered online this year to ease participation, featured high-profile researchers from other universities and UZH. The seminar drew both master's students, who could earn credit for attendance, as well as interested individuals from all over the globe.

Once again, the CSP researchers also successfully co-taught the Sustainable Investing master's course in the spring semester of 2021. Both CSP courses are essential for the long-awaited Minor in Sustainable Finance for master's students, which was successfully launched in August 2021 under the faculty and CCSF umbrellas.

Executive Education

With less than a year's preparation, the faculty and CCSF launched a full executive program for financial professionals, the Masters of Advanced Studies (MAS) in Sustainable Finance, in August 2021. This program is run in conjunction with the Certificate of Advanced Studies (CAS) in Sustainable Finance, allowing CAS graduates to take additional courses and upgrade to a Diploma of Advanced Studies (DAS), or the full MAS certificate. CSP continued to contribute the esteemed course, Sustainable Investing in Wealth Management, to the MAS/DAS/CAS curriculum in 2021.

Course enrollment benefited greatly from the experience gained in delivering online-only and hybrid training formats and remained at-capacity,

reaching an average of 58 participants for the mandatory courses, and 19 for elective courses. With the new MAS and its new courses such as Climate Change Finance, FinTech & Sustainability, and Ethics & Sustainability in Finance (the latter offered with the university's Advanced Studies in Applied Ethics program), and more in the pipeline for 2022, we remain, as a university, ahead of the curve in the academic executive education market for sustainable finance.



Focus for 2022

CSP will continue to contribute to the university education offered by the faculty and the CCSF. One of the highlights of the CCSF will be the introduction of an international competition in sustainable finance for business and finance students.

"The topics of sustainable finance are here to stay and all but a niche. We remain, as a university, ahead of the curve in the academic executive education market for sustainable finance."



Dr. Annette Krauss

Director of Teaching and Member of the CSP Management Board

Engage

From action to change



Community boat trip on Lake Zurich in 2021.

The research we do and the trainings we organize are just the beginning. Amplifying impact is at the core of our mission and is able to take shape through events, calls and in collaboration with partner organizations.

Due to Covid, **most of our events were held online** in 2021, with the benefit that participants from all over the globe were able to join. Topics for calls ranged from impact in public equity, to sharing your failures as an impact investor, to blockchain investing with an ESG lens.

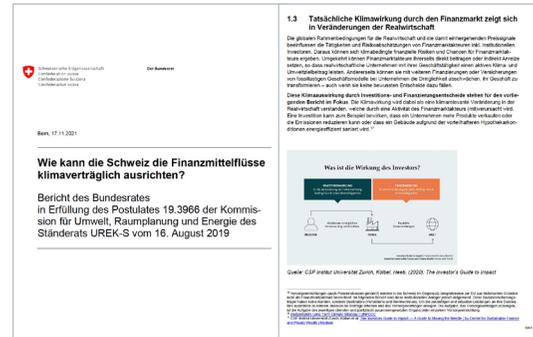
The documentary *Seaspiracy* motivated alumni from our NextGen community to focus on driving change in the ocean investing space. We established a **working group** with about 25 participants and hosted several calls to exchange knowledge, insights, and investment opportunities. Since Toniic has an Oceans Group as well, we started to collaborate on this topic to amplify impact in this domain.

As the Covid situation improved, we organized **several in-person and social events**. One member of our alumni community organized an impact trip to Greece in July, attended by members of the alumni community and impact partners. In the last quarter of 2021, we hosted drinks, dinners, and hikes in Switzerland and on the US West Coast, where we are leveraging the local impact community around the establishment of the CSP West Coast entity.

An outstanding success of our engagement work was the uptake of our work by regulators. As an example, the Swiss Government directly referenced the key framework of our work on “How investors have impact”, as shown in the following images:



Reference of the CSP Framework by the Swiss government:



New in 2021 was the implementation of a **Mentor Program**: First, successfully trialed in the new program for self-made wealth owners, participants were guided through their learning journey by an

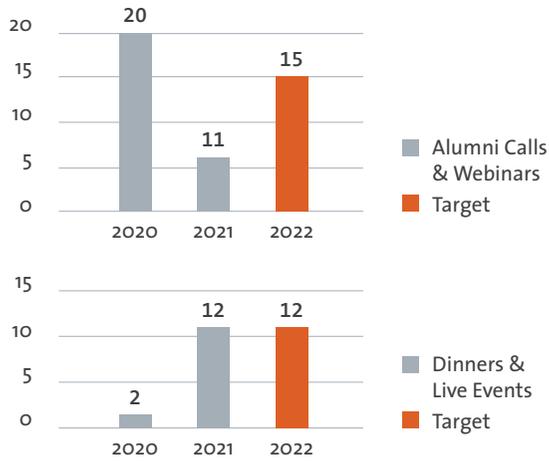
experienced impact investor. Following that, about twenty alumni from our wealth owner programs engaged in mentoring current cohort participants from the IRI/CSP Impact Investing for the Next Generation program. This proved to be an excellent way to transfer knowledge, skills, and motivation from experienced impact investors to new ones in this space.

In the last quarter of 2021, we hired Michelle van Waveren as our first **Community & Partnerships Manager**, who began a massive undertaking of calling each of our 160 NextGen alumni individually to connect and understand how CSP and the community can best help alumni on their impact journey.



Focus for 2022

We will continue our work to inform regulators about the key outcomes of our research. We will also advance our efforts to disseminate our research insights to wealth owners and wealth managers. To do this we are developing and implementing a wealth owner community strategy based on the findings of the ongoing interviews and conversations with partners and alumni to help accelerate the alumni's impact journey. For this, our 2022 goal is to increase the alumni engagement level by 20%.



Session during the impact trip in Greece in July, attended by members of the alumni community and impact partners.



We organized several social gatherings in 2021, like this dinner during the impact trip on the Greek island Samos.

What is the Meaning of Our Work?

Alumni about our Programs

"When I came to the program, I had a wishy-washy approach and a lot was in the air. Now I'm much more structured and am able to implement, also beyond investments, like social policies in our company."



Guneet Banga
IRI/CSP alum cohort '20-'21

"The program provided me with the initial vocabulary to be able to structure conversations about impact investing and with the network and support system to ensure that these conversations actually help me achieve my impact investing goals."



Lara Lemann
IRI/CSP alum '16-'17 cohort

"Although I came from a business background, I was not sure where to start with impact investing. The program gave me the knowledge, vocabulary and the confidence I needed to engage with my family office and begin aligning my investments with my values. It greatly accelerated my impact journey."



Frohman Anderson
IRI/CSP alum cohort '16-'17

"It was a great learning experience meeting like-minded NextGens from all over the globe, curated and brought together by the program. Furthermore the program helped me get a better understanding of the due diligence process. As a result I got a better overview of what it takes to succeed and the growing amount of opportunities for impact."



Ditte Lysgaard Vind
IRI/CSP alum cohort '16-'17

"I wanted to figure out how I could productively use the wealth I had accumulated to mitigate climate change. Over the course of the six months, my questions changed from what can I do with the money to what can I do with my skills, background, and motivation that money can help amplify."



Raffi Mardirosian
Accelerate Pilot Program '21 alum

"The program was a fantastic, interactive experience. I gained knowledge, tools, and practice that have been incredibly valuable to me in day-to-day communication related to sustainable investing with clients and colleagues. The program also gave me the opportunity to make strong connections with other financial professionals dedicated to sustainability. This will be invaluable for years to come."



Lindsey Woodward
Relationship Manager at Abacus,
Sustainable Investing in Wealth Management
participant

"As an impact investor, I need wealth management partners who understand sustainable finance and can construct a portfolio that suits my particular impact goals. This program is the most efficient and effective way to provide professionals with valuable learnings on these topics and is the best platform to start building more meaningful client relationships."



Paolo Fresia
Principal and
Investment
Director at 100%
Sustainability,
Sustainable
Investing in Wealth
Management
collaborator

Alumni about our Community

"I think CSP is powerful. When we, as a community, can get aligned behind a few thematic goals, I strongly believe we have an incredible amount of power for change, as each individual member is already so capable of moving things."



Maximilian Zeller
IRI/CSP alum cohort '20-'21

"CSP is a beautiful community of caring, dedicated people who have the means and the energy & drive to make a real change in the world."



Cynthia Fleischmann
IRI/CSP alum cohort '16-'17

"CSP is the most fun and beneficial network I know, since it is small and has a high concentration of HNW NextGens, which provides a safe space to engage and reach out."



Frohman Andersen
IRI/CSP alum cohort '16-'17

"I see that the CSP organization has a broader vision and for me it is a place that I'd like to keep coming back to help build that vision."



Ahmad Raza
IRI/CSP alum cohort '18-'19

Donors

"Time is running short when it comes to reaching global sustainability goals, which means that the demand for high-level research, tools that bring knowledge to practice, and collaborations that scale impact is increasing by the hour."



Antonis Schwarz
Co-initiator CSP & Anchor Donor,
IRI/CSP alum cohort '15/'16

"Pioneering and evolving, CSP's unparalleled research, training and ecosystem building, and focus on a collaborative approach are pillars catalyzing much needed financial and social transformation."



Natasha Müller
Donor of CSP, IRI/CSP alum cohort '16-'17

"For people and nature to thrive together, public and private investors all have a role to play in scaling up practical solutions. CSP can be a catalyst to engage a wide range of investors to have positive impact, and we are glad to support that goal."



Andrew Darrell
President of the Board, Stiftung Pro Evolution

"CSP is an enabler and an accelerator uniquely positioned in the ecosystem and equipped with the tools to make the sector do better across the board."



Benjamin Firmenich
Seed Donor of CSP, IRI/CSP alum cohort '15-'16

Partners

"The work of CSP, such as the jointly prepared annual Swiss Sustainable Investment Market Study as well as the Private Banking report, contributes to an accelerated uptake of meaningful sustainable finance practices amongst players of all segments of the Swiss financial center."



Sabine Döbeli
CEO, Swiss Sustainable Finance

"Falko and the team are hands-on experts when it comes to applying sustainable finance research in real-life context. Thanks to the CSP, our team is on top of the latest developments, leading to engaging discussions with clients and partners."



Caglar Bilgin
Sustainability Lead, Cape Capital

Who Makes This Happen?

CSP Management and Program Team



Prof. Dr. Marc Chesney
Academic Head



Dr. Falko Paetzold
Initiator & Managing Director



Dr. Annette Krauss
Director of Teaching



Rebecca Storbeck Trubac
Head of Operations



Francesca Spoerry
Head of Trainings & Outreach



Aspasia Daskalopoulou
Head of Communications



Michelle van Waveren
Community & Partnerships Manager



Erin Duddy
Sr. Program Manager - Wealth Owner Programs



Andrew Douglas
Institutional Programs Manager



Marietta Chatzinota
IRI/CSP Next Gen Program Lead



Kirsty Warwick
Executive Education Project Manager



Sanjana Rajaram
Student Assistant



Felicia Mändli
Student Assistant



Mira Moubarak
Student Assistant

CSP Research Team



Dr. Julian F. Köbel
Head of Research; PostDoc



Taeun Kwon
PhD Researcher; Blended Finance Research Lead



Anne Kellers
PhD Researcher; Wealth Manager Program Lead



Florian Heeb
PhD Researcher



Linda Isabella Hain
PhD Researcher



Jannis Morgenthaler
Student Assistant



Rebecca Storbeck Trubac
Head of Operations at CSP

“2021 marks a particularly exciting year for the CSP, as we began to lay down the foundation to broaden our international reach. Expanding as an organization allows us to maximize the team’s expertise, and in turn, maximize our global impact.”

CSP Fellows



Prof. Dr. Timo Busch



Prof. Dr. Emilio Marti



Temple Fennell



Jed Emerson



Jonathan Fu



Dr. Alessandro R. Anastasio



Anna Tervahartiala



Britta Gruenig



Fernando Scodro



Huey Ko Siew



Silvia Bastante de Unverhau



Björn Strüwer



Dr. James Gifford



Naiana Miranda



Nancy Reid



Harald Walkate

The Steering Committee and Advisory Board support in decision-making and strategy development to ensure we fill the needs and exceed the expectations of our key stakeholders.

Steering Committee



Monique Bär



Alois Flatz



Thomas Vellacott

Advisory Board



Benjamin Firmenich



Natasha Müller



Antonis Schwarz



Alois Flatz



Ivo Knöpfel



Odile Rundquist



Frank Niederländer



Johannes Weber



Alex Vukajlovic



Organizations We Collaborate With

Academic institutions



Networks



Organizations and multipliers





University of
Zurich ^{UZH}

CSP Center for Sustainable
Finance & Private Wealth