

GLOBAL IMPACT INVESTMENTS

Institutional & Family Office Investors

How to build- up innovative, scalable and transparent impact investments

Conference – November 16th, 2016 – Mövenpick Hotel - Geneva



With the exceptional participation of the following Impact Investment experts:

George Latham - Chairman

Managing Partner

WHEB Asset Management, London, UK

Allan Lerberg Jorgensen

Director, Human Rights and Development

Danish Institute of Human Rights, Copenhagen, DK

Karim Abdel Ghaffar Plaza

Director, Family Office Partners & Foundations

BlackRock, London, UK

John McKinley

Vice President, Impact Investing / Strategic Product Management,

BlackRock, London, UK

Henry Wigan

Co-Founder & Director of Investment,

Mustard Seed Impact Limited, London, UK

Paul McMahan, Managing Partner,

SLM Partners, New York, USA

Tenke A. Zoltani, CAIA, Director Impact Investing, UBS,

Zurich

Bonny Landers

Head of Sustainable, Responsible and Impact Investment

Sandaire Investment Office, London, UK

Florian Schmied

Chairman,

Tucher & Schmied Family Office, Munich, Germany

Seb Beloe

Partner and Head of Research

WHEB Asset Management, London. UK

Natija Dolic

Head Marketing & Communications

LGT Impact Ventures, Zurich, Switzerland

Jean Laville, Deputy CEO

Swiss Sustainable Finance Association, Zurich & Geneva

Guy delle Piane, Founder & Managing Partner,

Audaces Impact, London, UK

Markus Hill

Independent Asset Management Consultant, **Frankfurt, Germany**

Matthew Norman

Deputy Chairman,

Family Office Council, London, UK

François Golbery, Chairman,

ESAFON, Switzerland

Organised by:



Gold Partner:



WHEB

In Partnership with:



Media Partner:



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November 8th, 2016

François Golbery, Chairman, ESAFON, said:

Dear Executive,

The absolute necessity to safeguard our planet, the social and economic disruptions post financial crisis with world and central banks navigating uncharted waters called “deflation” are shaping a new world economic order that is finally taking into account social and environmental outcomes.

Socially and environmentally responsible investors are now taking into account positive outcomes and invest with impact.

Impact Investment has grown from its philanthropic roots in the PE/VC environment, to be seen increasingly as a serious investment approach with applications across asset classes.

The market capitalization for investment with impact has now reached 10 trn \$ through the SRI/ESG norm.

Join us to this First Annual Conference which will address the key challenges to the **design, implementation and measurement of an impact strategy embedded in the total asset allocation and portfolio management.**

Conference Key Highlights

- Latest key advances concurring to the exponential growth of the impact investment industry and market
- Iterative steps to the construction of a total portfolio including an impact strategy
- Impact metrics in PE early stage investment
- How does Sustainable Finance contribute to Impact Investing
- Impact investment and measurement methodology in listed equities with a focus on positive outcomes
- Agriculture and forestry impact investment opportunities
- How to widen access to impact investment strategies
- How should investors looking to allocate to impact go about it in practice?
- Aligning family office performance with family values
- Implementing, measuring and reporting positive impact across asset classes

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Agenda

Conference, November 16th, 2016

8.15 am-8.45 am: Welcome of the Participants

8.45 am-9.00 am: Opening Remarks by François Golbery and the Chairman

George Latham, Managing Partner

WHEB Asset Management, London, UK

9.00 am-9.45 am: Investing for Social Impact Towards 2030

- The Global Development Finance Scenario; How Could Impact Investors Navigate the Sustainability 2030 Agenda
- Social Impact Management Practices in leading MNEs

Allan Lerberg Jorgensen, Department Director, Human Rights and Development,
Danish Institute of Human Rights, Copenhagen, DK

9.45 am-10.45 am: Impact Investing – From idea to implementation: BlackRock's perspective

- BLK's approach to sustainable investing – Overview of platform, evolution of market, key trends
- Defining impact
- Taking a total portfolio view: Impact across asset classes
- Impact measurement, data and transparency
- Implementation within FO portfolios – Trends, preferences and considerations

Karim Abdel Ghaffar Plaza, Director, Family Office Partners, Foundations & Endowments,
BlackRock, London, UK

&

John McKinley, Vice President, Impact Investing - Strategic Product Management,
BlackRock, London, UK

10.45 am-11.15 am: Coffee-Break

11.15 am-11.45 am: How to Identify Relevant Impact Metrics in Early Stage Impact Investment Projects

- Impact lock step models - how to get impact to work for the bottom line, and vice versa
- Making impact key performance indicators (KPIs) relevant and implementable for fast growing, resource constrained companies
- Venture key performance indicators examples

Henry Wigan, Co-Founder & Director of Investment, Mustard Seed Impact Limited, London, UK

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11.45 am-12.30 am: Agri and Forestry Sustainable Investment Management

Paul McMahon

Managing Partner

SLM Partners, New York, USA

12.30 am -1.30 pm: Buffet Lunch hosted by:



1.30 pm-2.00 pm: Impact Investment Strategies

- Is Impact Investment a Strategy that can apply to Variety of Asset Classes and not only to Private Equity
- Is there enough Suitable Investable Products to Build-Up a Meaningful Impact Asset Allocation

Tenke A. Zoltani, CAIA, Director Impact Investing, UBS, Zurich

2.00 pm-2.30 pm: Multi Family Office and Client's Perspective to Due Diligence of Impact Investment Projects

- Manager's assessment – execution skills – team work
- How to define both financial and social returns goals early on to assess fit within the investment portfolio?
- How to define benchmarks/milestones/performance indicators for both financial and social criteria and timeframes?

Bonny Landers, Head of Sustainable, Responsible and Impact Investment, Sandaire Investment Office, London, UK

2.30 pm-3.15 pm: Impact Co-investment Projects: A Single Family Office Perspective

Florian Schmied, Chairman,

Tucher & Schmied Family Office, Munich, Germany

Chairman, European Union Sustainable Urbanization Association (EUSUA)

3.15 pm-3.45 pm: Afternoon Coffee Break

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3.45 pm-4.15 pm: Latest Developments in Sustainable Finance in Switzerland

Jean Laville, Deputy CEO, Swiss Sustainable Finance Association, Zurich & Geneva

4.15 pm-4.45 pm: Impact Investing Across Asset Classes:

- WHEB's approach to measuring and reporting positive Impact in listed equities
- Linking positive externalities and growth markets
- Mapping the intensity of positive outcomes
- Maximising the volume of capital allocated to creating positive outcomes

Seb Beloe

Partner, Head of Research

WHEB Asset Management, London, UK

PANEL SESSION

4.45 pm-5.45 pm: Impact Investor and Manager's Round Table: How to Select an Impact Investment?

- How to assess an impact manager's expertise with a short track record of performance?
- How to balance long term impact with short term track record?
- Preferred structure and governance issues
- Methodologies to measure impact alongside the investment life
- Risk profiling consideration and reporting
- Distribution issues over lock-up and exit strategies

Panelists:

- ✓ **Florian Schmied**, Chairman, **Tucher & Schmied Family Office, Munich, Germany**
- ✓ **Paul McMahon**, Managing Partner, **SLM Partners, New York, USA**
- ✓ **Bonny Landers**, Head of Sustainable, Responsible and Impact Investment, **Sandaire Investment Office, London, UK**
- ✓ **Natija Dolic**, Head Marketing & Communications, **LGT Impact Ventures, Zurich, Switzerland**
- ✓ **Guy delle Piane**, Founder & Managing Partner, **Audaces Impact, London, UK**
- ✓ **Matthew Norman**, Deputy Chairman, **Family Office Council, London, UK**
- ✓ **Markus Hill**, Independent Asset Management Consultant, **Frankfurt, Germany**
- ✓ **Seb Beloe**, Partner, Head of Research, **WHEB Asset Management, London, UK**

Moderator:

François Golbery, Chairman, **ESAFON, Montreux, Switzerland**

5.45 pm- 6.00 pm Closing Remarks by the Chairman

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GOLD PARTNER



WHEB

WHEB Asset Management is a specialist fund management business owned and managed by some of the most experienced practitioners of sustainable investment in the sector. The business is focussed on a single investment strategy. We seek to generate superior returns from global equities by investing in companies providing solutions to some of the most serious environmental and social challenges facing mankind over the coming decades.

Our corporate mission in support of this aim is to “**advance sustainability and create prosperity through positive impact investments**”.

For more information, please visit our web site: <http://www.whebgroup.com>

PARTNERS



The Family Office Council is a membership group for Single Family Offices with leadership and agenda set by Single Family Offices. Members of the Council are Principals and Single Family Office Executives.

The purpose of the Family Office Council is:

- To create a community for Family Office Executives to meet their needs
- To improve the services provided to Family Offices and UHNW individuals internationally by exchanging best practices
- To provide a forum for communication of best practice between Family Offices
- To improve public understanding of Family Offices and create a better environment for Family Offices.

For more information, please visit FOC website: <https://familyofficemouncil.com>



Swiss Sustainable Finance (SSF) strengthens the position of Switzerland in the global marketplace for **sustainable finance** by informing, educating and catalyzing growth. The association, founded in 2014, has representation in Zurich, Geneva and Lugano. Currently SSF unites over 90 members and network partners from financial service providers, investors, universities and business schools, public sector entities and other interested organisations. An overview of Swiss Sustainable Finance’s current members and network partners can be found on our web site.

For more information, please visit SSF website: <http://www.sustainablefinance.ch>



MGFF is a **global impact investment advisor** helping investors select impact investment opportunities, overcome the lack of information and track record, and undertake due diligence.

MGFF is helping managers **structure impact investments** and assist them in fund raising. **MGFF** is a strategic advisory firm based in Dublin, with 16 years’ experience in addressing new developments that will have a long-term impact to the Fund and Wealth Management Industry in Europe, the US, LATAM and Asia.

MGFF provides a strategic vision to complex investment environment with a specialty in **real assets and impact investing**.

For more information, please visit our web site www.mgffadvisory.com

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EVENT PARTNER

PRIVATE EQUITY INTERNATIONAL

The **GLOBAL IMPACT INVESTMENTS** participants will benefit from a 10% discount to register to **GIIN INVESTOR FORUM 2016 / 7-8 December 2016 / Amsterdam**



MEDIA PARTNERS



Absolut Research stands for professional expertise in institutional asset management. The question as to how investors can take better account of sustainability or environmental, - social and governance (ESG) criteria has recently become a focus issue for institutional investors. Absolut Research, as a signatory of the Principles for Responsible Investment (PRI), supports the trend towards holistically sustainable concepts. Increasingly important topic, we are launching a new publication – **Absolut|impact**. The new publication will show **institutional investors** – our readership – the whole spectrum of sustainable investment, supplementing our core publication, Absolut|report, in this area. It is about **responsibility, a long-term orientation** and new ways of thinking among –institutional investors, in other words, **sustainable perspectives**.

For more information, please visit our web site: www.absolut-research.de

WHO SHOULD ATTEND

- **Institutional Investors including Asset Managers, Insurers, Re-insurers, Pension Funds,**
- **Large scale Family Offices, Endowments and Foundations,**
- **Asset & Fund Managers, Lawyers, Administrators and Service Providers,**
- **Global Heads of Fund Development, Private Banks and Wealth Managers willing to set-up and implement impact investment fund vehicles.**

WHY ATTEND

- **Catch-up** with recent research and impact industry developments
- **Learn** how to implement an impact investment strategy in a total portfolio
- **Understand** from global experts and interactive sessions what are the impact industry opportunities and challenges and make sure you are part of the conversation
- **Identify** innovative investment opportunities and meet impact investors & co-investors as well as a range of global partners all involved in impact investments
- **Discuss** strategies with impact investors as they share their successes, failures and thoughts on future of impact investment

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SPEAKERS



George Latham, ASIP, Managing Partner and Chief Investment Officer, WHEB Asset Management, London, UK

George is responsible for management of WHEB's Listed Equity business. As CIO he is responsible for overseeing the investment process and chairing the Investment and Risk Committee. He also plays an active role in business development and oversees institutional client relationships.

Prior to joining WHEB, George led the award-winning SRI team at Henderson Global Investors. During his fifteen years managing UK and pan-European equity and managed funds, George has been awarded 'A' and 'AA' Citywire ratings, nominated for Investment Week's Fund Manager of the year and named in Citywire's top 100 managers in the UK. He was also responsible for designing and launching Threadneedle Asset Management's sustainable and responsible investment strategy.

George has a degree in Geography from Oxford University, and served as a British Army Infantry Officer, and holds UKSIP qualifications.



Allan Lerberg Jorgensen, Department Director, Human Rights and Development, Danish Institute of Human Rights, Copenhagen, DK

Allan Lerberg Jorgensen is Department Director at the Danish Institute for Human Rights where he is responsible for the Institute's work in the areas of sustainable development and business. He leads a team of 15 human rights specialists working internationally to promote human rights principles and standards in the context of sustainable development, business, trade and investment.

Prior to joining DIHR in 2006, Allan worked on business in society issues at The Copenhagen Centre for Corporate Responsibility, a government think tank, and at the Confederation of Danish Industries, Denmark's main employers association. He serves on the Sustainability Advisory Board of the Danish Industrialisation Fund for Developing Countries. Allan holds an MA in Political Science from the University of Copenhagen, Denmark, and an MA in International Conflict Analysis from the University of Kent at Canterbury, UK.

Established in 1987 by an act of Danish Parliament, the Danish Institute for Human Rights is Denmark's National Human Rights Institution, accredited in accordance with the United Nations Paris Principles. DIHR is mandated under Danish law to protect and promote human rights in Denmark and internationally and has approximately 120 staff.

<http://humanrights.dk/staff/allan-lerberg-jorgensen>

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Karim Abdel Ghaffar Plaza, Director, Family Office Partners, Foundations & Endowments, **BlackRock, London, UK**

Karim Abdel-Ghaffar Plaza, Director, is a member of BlackRock Family Office, Charities and Endowments Group in EMEA, a global platform designed to cater solutions for a distinct investor base through leveraging BlackRock's investment and business expertise. Mr. Abdel-Ghaffar is responsible for delivering investment strategy as well as developing and maintaining relationships with family offices in EMEA.

Karim Abdel-Ghaffar's service with the firm dates back to 2008. Prior to assuming his current role in 2013, he was part of the Global Wealth Management Team providing asset management advice to financial advisors in EMEA. He began his career at Merrill Lynch's Global Private Client Group in Monaco.

Karim Abdel-Ghaffar earned an MA degree in economics and management from the University of St. Andrews in 2007, and an MLitt degree in finance and management, *with distinction*, also from the University of St. Andrews in 2008.



John McKinley, Vice President, Impact Investing / Strategic Product Management
BlackRock, London, UK

John McKinley is a founding member of the BlackRock Impact team and works closely with the firm's global investment teams across equity, fixed income and alternatives to develop scalable, innovative investment solutions that address clients' financial objectives alongside their social or environmental objectives.

Prior to joining BlackRock in 2014, John McKinley served as Innovation Manager at Acumen, a social venture fund investing debt/equity in companies delivering goods and services to low-income consumers across Southeast Asia, Africa, and Latin America. Prior to Acumen, Mr. McKinley served as a senior policy analyst in the Office of Mayor Michael Bloomberg in New York City and managed rule of law development programs across 17 countries in Africa and the Middle East with the U.S. Department of Justice. He has written for Harvard Business Review and lectured on impact investing at Haas School of Business, Columbia Business School, London School of Economics, and the McDonough School of Business at Georgetown University.

John McKinley holds a BA from Middlebury College and a Masters in Economic and Political Development from Columbia University.

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Henry Wigan, Co-Founder & Director of Investment, Mustard Seed Impact Limited, London, UK

Henry Wigan is co-founder of Mustard Seed. Prior to Mustard Seed Henry was a portfolio manager in emerging and frontier markets at both BlackRock and Goldman Sachs. Mustard Seed is an impact venture capital firm that seeks to solve some of the world's biggest social and environmental problems. It has backed the likes of What3Words - a global address system for the 4bn unaddressed - and Winnow Solutions - a technology company that seeks to reduce the 1 trillion dollars of food wasted annually. Mustard Seed believes that by investing in the most innovative impact ventures it can in fact generate higher, rather than lower economic returns for investors.



Paul McMahon, Managing Partner, SLM Partners, New York, USA

Paul McMahon is a co-founder of SLM Partners, a business that acquires and manages rural land on behalf of institutional investors. With offices in New York, London and Australia, it seeks to scale up regenerative, ecological farming and forestry systems that deliver both financial returns and environmental benefits. Its first fund – the SLM Australia Livestock Fund – has raised AU\$105 million in equity and debt, and acquired more than 1 million acres of land in Australia for grass-fed cattle production. SLM Partners is now developing a sustainable farmland and sheep production strategy in Chile. It is also launching a new fund that will invest in forestry in Ireland, with the European Investment Bank as anchor investor.

Previously, Paul was Vice-President at Climate Change Capital Ltd, where he led a team developing a strategy for a global farmland fund, and, before that, an Engagement Manager at McKinsey & Company in New York. He has also acted as an advisor on sustainable agriculture to the UN Food & Agriculture Organisation and The Prince of Wales's International Sustainability Unit. In 2013 he published a book on the global food system titled *Feeding Frenzy: The New Politics of Food*. Paul holds a PhD from Cambridge University and a BA from University College Dublin.

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Tenke A. Zoltani, CAIA, Director Impact Investing, **UBS, Zurich**

Tenke Zoltani is an expert in the field of impact investing, with transactional experience from strategy to execution, focusing on the climate, food, water, and energy segments. She was most recently Director, Impact Investing at UBS where she joined to develop the impact advisory offering for UHNW clients of the bank. With a decade of experience in the field of sustainable finance, before joining UBS Tenke founded Better Finance, a boutique advisory company. She worked with families, international corporations, NGOs, and individuals to identify, design, implement and manage sustainable financial solutions to impactful investing and philanthropic giving. Prior, Tenke was an Investment Manager at Islan Asset Management in Switzerland, advising global agribusiness Bunge on direct investments, and implementing projects in least developed countries' food-water-energy sectors.

Tenke is a CAIA charterholder, and was selected as a 2013 Global Economic Symposium Fellow. She is a Committee Member for 100 Women in Hedge Funds, an Executive Committee member of Sustainable Finance Geneva, and on the advisory boards of the AlphaMundi Foundation and Impact Finance. Tenke holds a B.A. in Economics and Political Science from Columbia University and a M.Sc. in International Political Economy from the London School of Economics.



Bonny Landers, Head of Sustainable, Responsible and Impact Investment, **Sandaire Investment Office, London, UK**

Bonny helps develop Sandaire Investment Office's capabilities in Sustainable, Responsible and Impact Investment as well as advising families regarding their governance structures and assisting them to define their legacy. Bonny is an experienced finance professional, having spent more than 25 years working in America, Europe and Asia at large international banks in senior roles and across the full spectrum of products. In 2005, she was appointed CEO of a large single family office in Hong Kong and specialised in assisting family members in the sphere of socially responsible and impact investment. From 2013 to 2015, Bonny ran her own company as an independent consultant to assist families and foundations wishing to increase their sustainable and impact investments.

Bonny is an Honours graduate of Harvard University and holds the Diploma for Non-Executive Directorship from the Financial Times/Pearson Group.

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Florian Schmied, Chairman,
Tucher & Schmied Family Office
European Union Sustainable Urbanization Association, Munich, Germany

图赫施密特家族办公室/ 欧洲可持续城镇化协会

Florian Schmied is the chairman of European Union Sustainable Urbanization Association (EUSUA), which was established in 2012 under the umbrella of China EU Urbanisation Partnership. The major mission of EUSUA is to build up communication between Chinese and European organizations and businesses and promote the sustainable urbanisation.

The Corner-Stone project to fulfill this aim is the China EU Future City (CEFC) Project, which as the pilot project of the EU-China Partnership on Sustainable Urbanisation initiated by Premier Li Keqiang and the President of the European Commission J.M. Barroso shall showcase and implement EU technologies and products in order to help the sustainable development of China's urbanisation.

Furthermore, Florian Schmied is the Chairman of Tucher & Schmied (T&S) Family Office. It is managing all of the business of the Family, which has consecutive investment for over 500 years. Huan De Group, Euro Sino Invest Group, and M&P Group are the groups under T&S FO with business related to China. They are covering the fields of engineering, investment, and project development respectively. The CEFC project is mainly financed by T&S.



Seb Beloe, DIC, CEnv, Partner, Head of Research,
WHEB Asset Management, London, UK

Seb is Head of Research and leads the integration of sustainability analysis within the investment process, as well as overseeing engagement activities.

Previously, Seb was Head of SRI Research at Henderson Global Investors where he led on the identification and analysis of sustainability themes and company-level corporate responsibility analysis. Prior to Henderson, Seb was the Vice President of Research and Advocacy at SustainAbility. He has published several reports on sustainable business, and has been a member of numerous corporate advisory boards and awards panels.

Seb has two degrees in environmental science and technology, from the University of East Anglia and Imperial College and is a Chartered Environmentalist.

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Natija Dolic, Head Marketing & Communications
LGT Impact Ventures, Zurich, Switzerland

Natija Dolic is Head of Marketing and Communications at LGT Impact Ventures, founded in 2007 as the impact investing arm of LGT - the world's largest privately owned Private Banking and Asset Management group with USD 146 billion AuM (as of June 30th 2016). Natija has over 10 years of experience in impact investing, communications and journalism with a regional focus on developing and emerging countries, Germany, Switzerland and Spain. Previously, she was a Relationship Manager at American Express, and worked as journalist covering economic, social and cultural topics for various newspapers and magazines. Natija regularly speaks at conferences, holds workshops and authors articles on topics related to impact investing and social entrepreneurship. She holds a Master's degree in International Business & Cultural Science, and Journalism from the University of Passau, Germany.



Matthew Norman, Deputy Chairman, **Family Office Council, London, UK**

Matthew advises several UK based resident non-domiciled families and is a director of a UK charity founded by a UHNWI. Matthew's prior experience includes eight years working for a London based Brazilian family as head of investments, this role included consolidation and reporting on all of the family's assets, discretionary management of the liquid wealth and running relationships with numerous banking, legal, trust and consultancy firms.

Matthew is Deputy Chairman of the Family Office Council, a membership group for Single Family Offices. Matthew regularly speaks at industry conferences on issues such as family governance, philanthropy and the running of family offices, while he is often consulted by families on both philanthropic and next generation issues



Markus Hill, Independent Asset Management Consultant, **Frankfurt, Germany.**

Markus Hill is an independent asset management consultant based in Frankfurt, Germany. In addition, he worked as head of sales and PR for a German fund boutique. Since 2005 he has specialized in the management of mandates – marketing and PR (consulting, "introducing"). Markus is also involved in selecting themes in the specialist areas of target funds with a multi-management aspect, fund boutiques and mutual funds for institutional investors (product scouting, fund selection). Market entry into Germany, behavior of fund selectors and fund providers in the German asset management industry are often discussed by him, e.g. in his asset-management-publication **MH-Fokus**.

Through many articles, columns and presentations (national and international) he has become a highly recognized expert in the German asset management industry. "Industry multiplier" is a term often used by journalists and clients to describe his style and personality.

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ESAFON BOARD MEMBERS



François Golbery, Chairman, ESAFON, Switzerland

fgolbery@esafon.com

François Golbery is the Chairman of ESAFON, a non-profit independent association registered in the Registrar of the Federal Office in Bern with the objective of promoting and facilitating best practices amongst professionals from the asset, fund and wealth management industries across Switzerland and Europe.

François is also **Senior Managing Partner of MGFF Ltd**, a global strategic advisor to Institutional & Private Investors for long-term and sustainable investments.

François, through its long-term involvement at MGI in organizing high-level expert – driven conferences addressing the strategic consequences of EU principle-led directives within the Lamfalussy procedure in Europe has been at the forefront of interactive developments towards the best practices within the financial industry across Europe.

Established in Switzerland since 1997, he contributes and helps financial centres to formulate their strategic positioning and train market participants to implement change in day-to-day business practices. Prior to MGI, François Golbery has served in various senior positions in Marketing and Finance within multinational companies. In 1988, he started-up and grew the French subsidiary of IIR in Paris as the most profitable entity of the group. He took over the responsibility of the Portuguese office as well.

He holds an MBA in Finance from the University of Hartford (Connecticut).

François Golbery is a member of the Royal Ocean Racing Club in London



Dr Anne Walhain Golbery, Managing Director, ESAFON, Switzerland

a.golbery@esafon.com

Dr Anne Walhain Golbery is **Managing Director** and **Board Member of ESAFON**, a non-profit independent association started in 2001. Anne is Head of the Global Operations including RP, Partnership, Customer Service, Marketing, IT, Finance, and Human Resources.

Anne is also **Managing Partner of MGFF Ltd**, a **global strategic advisor** to Institutional & Private Investors for **long-term and sustainable Impact investments**.

Anne has been with François Golbery, the co-founder of MGI Management Global Information SA, managing the global operations of MGI for 18 years. Previously, as IT Program Manager, Anne has been designing and implementing Technical Information Systems for the Space Electronic Equipments at EADS, France, for 12 years, from 1982 to 1994.

Anne held a **Doctorate in Atomic Physics**, University of Caen, France, 1979. Two from among her five children, Briec & Severine Maisonneuve, are running their **own Family Business in the 3rd generation**. His youngest son, Edouard Golbery, Master Degree in Finance from HEC Lausanne, after 2 years as Treasurer at L'Oreal, arrived 4th from the Class 40 in the famous transatlantic solo race **TheTransat Bakerly**, Plymouth-New York, last May 2016.

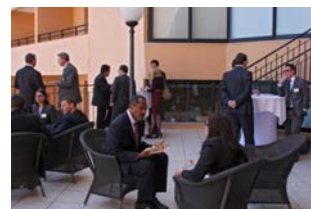
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ESAFON 2017



If you are an Asset Manager, a Fund Manager, the Head of a Family Office or a Strategic Advisor, join for 2017

ESAFON – The European & Swiss Network of Asset and Fund Managers, Family Offices and Strategic Advisors

ESAFON is a non-profit Association located in Montreux including **100 honorary members**.

ESAFON's objectives are to promote the cooperation between Switzerland and Europe and to facilitate the exchanges between professionals in the area of Asset Management & Family Wealth Management, to allow its members to discuss together and to implement the new regulations and the best management practices, with an objective geared towards harmonisation and transparency.

The primary **ESAFON objectives 2017** are to **increase the scale and effectiveness of Global Impact Investing**.

Impact investments are investments made by companies and funds to generate **measurable social and environmental impact** aligned with **financial return**.

ESAFON members network with major international leaders through think tank meeting and social events as private luncheon, dinners, workshops, conferences and forums.

- Their details are added to the **ESAFON DIRECTORY** which is updated on a monthly basis.
- They benefit from **one personal complimentary invitation to one ESAFON conference 2017** and from a **50% discount** on their registration fee to all ESAFON Conferences during one year.
- They will have access to the **GLOBAL IMPACT FAMILY OFFICE CO-INVESTMENT PLATFORM 2017** through the **ESAFON** website: www.esafon.com
- The Annual **Individual Membership Fee** 2017 is 400 CHF.
- The Annual **Institutional Membership Fee** 2017 is 1'500 CHF. It allows each Institution, Member of ESAFON, to register until 5 executives as ESAFON Member
- **ESAFON Honorary Membership**: this membership is restricted to the Donors willing to support the Association ESAFON for one year : from 2'000 CHF
- Please find ESAFON MEMBERSHIP APPLICATION FORM below.

For more information concerning ESAFON Membership, please contact:

Dr Anne Golbery, Senior Managing Director, **ESAFON** by either

e-mail: a.golbery@esafon.com, or ***mobile phone:*** + 33 6 45 83 67 67

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Please return this form to **ESAFON** *by email*: a.golbery@esafon.com



ESAFON APPLICATION FORM 2017

Name:

Job Title:

Company:

Address:

City & Zip-Code:

Country:

Telephone:

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