

FAMILY WEALTH CONFERENCE GENEVA

FAMILY WEALTH  
CONFERENCE GENEVA

FAMILY WEALTH  
CONFERENCE GENEVA

FAMILY WEALTH  
CONFERENCE GENEVA

2<sup>ND</sup>

FAMILY WEALTH  
CONFERENCE GENEVA

FAMILY WEALTH  
CONFERENCE GENEVA

FAMILY  
WEALTH CONFERENCE  
GENEVA

# INVITATION

2<sup>ND</sup> FAMILY WEALTH CONFERENCE  
GENEVA

FRIDAY 1 SEPTEMBER 2017  
CONFERENCE AND LUNCH  
FOUR SEASONS HOTEL DES BERGUES



**Dear guest,**

As a renowned strategic partner of the world's leading family offices and wealth managers, Allianz Global Investors is delighted to organise the second edition of the annual Family Wealth Conference in Geneva.

In today's challenging market environment, family wealth preservation is more important than ever. Financial repression remains in place while global debt level is still slightly rising, influenced by the emerging markets. Therefore, we believe that monetary policy will stay lower for longer, accompanied by higher political risk factors. Given the fact that many asset classes have been distorted by this monetary policy, investors must look for additional investment opportunities and must manage increased risk more carefully to reach their return expectations.

The 2<sup>nd</sup> Family Wealth Conference Geneva will provide you with an economic outlook and will address new investment ideas and trends. Patrice Lefèvre-Péaron from Jeantet will start with some initial thoughts about efficiency in legal structuring for wealth management.

It will be followed by a financial market outlook with Dr Michael Heise, Allianz' Chief Economist, a presentation about volatility management as an asset class with stable returns, and a presentation on our newly acquired US private credit solutions.

Also, we will discuss investment opportunities in the field of Artificial Intelligence with Allianz' Head of US Technology Research. Prof Boi Faltings, founder and director of the Artificial Intelligence Laboratory at EPFL will explain what AI actually is, what new capabilities it brings, and how it is likely to influence our future. Finally, Nishant Sinha, Senior Manager at Accenture Digital, will give us a look "behind the scenes" and will show us how far robo-advice can already be seen as a next industrial revolution for private wealth management.

We are looking forward to an interesting event and to your participation.



Marcel Salzmann



Mathieu Vinson

## 2<sup>nd</sup> Family Wealth Conference Geneva, Friday 1 September 2017

### Artificial Intelligence: what's the big deal?

08:30 Registration

Salle des Nations

09:00 **Welcome speech by Allianz Global Investors**  
Mathieu Vinson, Head Wholesale Business Suisse  
Romande & Ticino, Allianz Global Investors

09:10 **Get the opportunity of private funds dedicated to Swiss and BRICS based families**  
Patrice Lefèvre-Péaron, Partner, Cabinet Jeantet

09:40 **Low growth - low yield environment – what comes next?**  
Prof Dr Michael Heise, Chief Economist, Allianz SE

10:10 **Generating alpha by investing in volatility**  
Peter Pilavachi, Director, Senior Product Specialist,  
Allianz Global Investors

10:30 **US Private Credit Solutions: Private Credit Investing across market cycles**  
John Thompson, Director, Portfolio Manager,  
Allianz Global Investors

10:50 Coffee break

Salon du Lac

11:10 **Artificial Intelligence: what's the big deal?**  
Keynote speaker: Prof Boi Faltings, founder and director of the Artificial Intelligence laboratory, EPFL

11:40 **Robo-Advisory – Rise of AI in wealth management**  
Nishant Sinha, Senior Manager,  
Accenture Digital – Advanced Analytics

Salle des Nations

12:10 Cocktail

12:30 Lunch

12:30 **Artificial Intelligence and its investment implications**  
Sebastian Thomas, Director, Head of US Technology Research, Allianz Global Investors

13:00 **Artificial Intelligence panel discussion**  
Prof Boi Faltings, EPFL  
Nishant Sinha, Accenture  
Sebastian Thomas, Allianz Global Investors  
Moderator: Marcel Salzmann,  
Country Head Switzerland, Allianz Global Investors

14:00 End of the conference



This conference is organised by AllianzGI  
in collaboration with SPHERE  
financial communication company.

## Venue

Four Seasons Hotel des Bergues  
33, Quai des Bergues  
1201 Geneva  
Switzerland

## Information and Registration

We kindly ask you to register  
before August 25<sup>th</sup> by contacting:

SPHERE  
Grand-Rue 19, Po Box 6472  
1211 Geneva 6  
P +41 22 566 17 32  
Email [events@sphere.swiss](mailto:events@sphere.swiss)

We kindly ask you to check if the acceptance of this invitation complies  
with your company rules and applicable laws.

# Speakers



## Prof Boi Faltings

Professor Faltings is a full professor of computer science at the Ecole Polytechnique Fédérale de Lausanne (EPFL), where he founded, and currently directs, the Artificial Intelligence Laboratory. He is also a fellow of the European Coordinating Committee for Artificial Intelligence, as well as the Association for

Advancement of Artificial Intelligence (AAAI). Prior to serving as head of the Institute of Core Computing Sciences, he headed the EPFL computer science department.

Professor Faltings has worked in AI since 1983 and published over 300 refereed papers and graduated over 30 PhD students, several of which have won national and international awards. His main research contributions are in the area of qualitative and model-based reasoning, case-based reasoning, constraint programming, distributed problem-solving, and computational game theory. He has co-founded 6 companies in e-commerce and computer security, and acted as advisor to several other companies world-wide.



## Prof Dr Michael Heise

Michael Heise is Chief Economist of Allianz SE. He advises the board of Allianz SE on economic and strategic issues. He is responsible for analysis and forecasts of the German and the international economy and the financial markets and risk analysis.

Professor Heise studied and graduated at Cologne University and lectured at the European Business School in Oestrich-Winkel and at the Johann Wolfgang Goethe University in Frankfurt-am-Main. He is honorary professor at the Johann Wolfgang Goethe University.

Before joining Allianz Group, Professor Heise was Secretary General of the German Council of Economic Experts, Chief Economist of the DG Bank and Chief Economist and Head of Research at DZ Bank.



## Patrice Lefèvre Péaron

As Managing Partner of Jeantet Geneva office, which he opened, Patrice Lefèvre-Péaron has concentrated his practice on business law and taxation of businesses and reference shareholding families.

He is the author of several articles on business and asset taxation on

behalf of the Bureau of National Affairs (BNA), the leading US tax law publisher. He is also the author of the French chapter of "International Tax Systems and Planning Techniques" published by Reuters.

Patrice Lefèvre-Péaron advises clients on all tax and legal aspects of their M&A and complex real estate transactions (structuring, drafting and negotiation of documents, due diligence, etc.). He also advises a number of prominent real estate development groups.

Jeantet Switzerland is the only international law firm present in Switzerland consisting of French and Swiss lawyers practicing business and tax law.

Prior to joining Jeantet Switzerland, Patrice Lefèvre-Péaron was Partner in leading French and Anglo-Saxon business law firms for more than fifteen years.



## Sebastian Thomas

Sebastian Thomas is a portfolio manager, a senior research analyst and a director with Allianz Global Investors, which he joined in 2003. He heads the firm's US technology/telecom research effort and is responsible for covering large- and mid-cap software and internet-technology companies.

Sebastian Thomas is also a lead portfolio manager. He has 20 years of investment-industry experience.

Sebastian Thomas previously worked at Roger Engemann & Associates, a Phoenix Investment Partners company; Fidelity Management and Research; Morgan Stanley; and the Federal Reserve Board of Governors. He also has experience designing, developing and managing software applications.

Sebastian Thomas has a B.A. in economics from Pomona College and an M.B.A. in finance and strategy from the University of Chicago. He is a CFA charterholder.

# Speakers



## Nishant Sinha

Nishant Sinha joined Accenture in 2010. Nishant is based in Kronberg, Germany. As Senior Manager in Accenture Digital, his focus area is on Advanced Analytics in the Financial Services industry. In his current role, he works closely with major companies across the globe helping them to utilize Artificial Intelligence, Machine

Learning and Deep Learning in order to drive business value across their organization's functions.

Nishant Sinha has extensive consulting experience in setting up large scale Advanced Analytics teams across North America, Latin America, the UK, South East Asia and Germany. He has helped organizations to identify, build and execute their Analytics journey by leveraging a combination of people, processes, data and technology.



## John Thompson

John Thompson is a portfolio manager on the AllianzGI US Private Credit Solutions team focused on private credit investments in the energy, industrials, media & telecom and technology industries. He joined the firm following the acquisition and integration of Sound Harbor Partners and has 19 years of financial services

and management consulting experience.

Prior to joining Sound Harbor in 2009, John Thompson was a credit analyst for Commercial Industrial Finance Corporation where he was responsible for analyzing and recommending both broadly syndicated and middle-market leveraged loan opportunities. John Thompson worked as a Managing Consultant for IBM Corporation-Business Consulting Services (formerly PricewaterhouseCoopers), where he managed project teams that completed strategic and systems integration projects for Fortune 500 companies.

John Thompson earned a B.A. in Economics from Williams College and earned an MBA from the Stern School of Business at New York University.





## Peter Pilavachi

Peter Pilavachi is a senior product specialist and a director with Allianz Global Investors, which he joined in 2016. He is a member of the Structured Products team and is responsible for articulating to investors option - and volatility- based investment solutions, with a focus on clients in Europe and Asia.

Peter Pilavachi has 18 years of investment-industry experience. He was previously a senior salesperson in the strategic equities solutions unit for corporate and family offices at UBS and head of derivatives sales at Barclays Capital; before that, he worked at J.P. Morgan and was an equities derivatives trader.

Peter Pilavachi has a B.S. in economics and management, and a master's degree in finance from the University of Lausanne, Switzerland.



# Your hosts



**Sandra Sonnleitner**

Head of Wholesale & Retail D/A/CH  
Phone: +49 69 24431 2798  
sandra.sonnleitner@allianzgi.com



**Mathieu Vinson**

Head Wholesale Business Suisse  
Romande & Ticino  
Phone +41 44 206 44 70  
mathieu.vinson@allianzgi.com



**Reto Eisenhut**

Head Wholesale Business Switzerland  
Phone +41 44 206 44 79  
reto.eisenhut@allianzgi.com



**Marcel B. Salzmann**

Country Head Switzerland  
Phone +41 44 206 44 77  
marcel.salzmann@allianzgi.com



**Gerhard Single**

Head of Key Accounts  
Family Offices & Asset Manager  
Phone: +49 69 24431 2324  
gerhard.single@allianzgi.com





Allianz Global Investors (Schweiz) AG  
Gottfried-Keller-Strasse 5  
CH-8001 Zürich  
[www.allianzglobalinvestors.ch](http://www.allianzglobalinvestors.ch)