



GROUPEMENT SUISSE DES CONSEILS EN GESTION INDÉPENDANTS - GSCGI
SCHWEIZERISCHE VEREINIGUNG UNABHÄNGIGER FINANZBERATER - SVUF
ASSOCIAZIONE SVIZZERA DEI CONSULENTI FINANZIARI INDIPENDENTI - ASCFI
SWISS ASSOCIATION OF INDEPENDENT FINANCIAL ADVISORS - SAIFA

CIFA INITIAL CONTRIBUTOR

INVITATION / INSCRIPTION

Déjeuner-conférence 20 Avril 2018

Nous avons le plaisir de vous inviter, avec vos collègues et ami(e)s à notre prochain déjeuner-conférence qui aura lieu à Genève, organisé en collaboration avec Bluecap, Membre du GSCGI et la Banque Heritage.

Le thème suivant, d'actualité certaine et de grand intérêt pour les conseils en gestion indépendants, les gestionnaires de fortune indépendants, les gestionnaires de fonds d'investissements et les analystes financiers, ainsi que tout acteur de la place financière en général, sera présenté:

ISR 2.0

Au-delà des critères d'investissement socialement responsable, la notion de Partage



Eric A.C. Serra, Associé, Bluecap SA
MA en gestion internationale, HEC Genève.

Responsable de salle des marchés, vente de produits financiers, clientèle institutionnelle et privée auprès de Crédit Suisse, Monte dei Paschi di Siena, Banque Von Ernst.

De 2006 à 2012, chargé de cours de Finance auprès de la European University Business School.

Indépendant depuis 2003, Président de la commission d'éthique professionnelle du GSCGI de 2009 à 2017, a rejoint Bluecap en 2012.



Marcos Esteve joined the Bank in 2006 and has held a number of key senior management positions before being named Chief Executive Officer in July, 2017. From January 2014 to July 2017, Marcos was Global Head of Private Banking. His prior assignments included Chief Financial Officer and Chief Operating Officer of the Bank, positions which afforded him an in-depth and thorough understanding of the intricacies of banking operations, the inherent regulatory framework, and the bank's client service offering. Before joining Banque Heritage, he was Chief Financial Officer at a leading firm in the global fashion industry where he was responsible for the financial management of the group and where he also sat on the Board of Directors. During this time, he was appointed a member of the Board of Directors and of the Executive, Audit, and IT committees at Banque Heritage. Marcos started his professional career in the corporate internal audit division of Nestlé's Swiss headquarters.



Jean-Charles Crouzet joined Banque Heritage in 2008 as a Head of Hedge Fund Research/Portfolio Manager within the Alternative Investment Department. Prior to joining Heritage he gained extensive experience in the field of alternative investments. Mr. Jean-Charles Crouzet worked for Alternative Investment Services in Geneva (partner) as a senior hedge fund analyst and portfolio manager, for PRISM invest in Morges as a Senior Analyst/Portfolio manager, and for Agora Capital Services in Geneva as a senior Analyst/Portfolio manager. Prior to that, Mr. Jean-Charles Crouzet started his career in London as a fixed income trader on emerging markets (NatWest Markets, Nikko Europe plc). Mr. Jean-Charles Crouzet holds a M.Sc in Finance from the Strathclyde University of Glasgow and a BA (Hons) in European Studies from the Humberstone University.



Mikaël Safrana heads fund selection within the Asset Management department of Banque Heritage. The team focuses on long-only & Alt-UCITS strategies used throughout discretionary and advisory mandates, covering all major asset classes and regions. Mikaël is an active member of the advisory team, member of the investment committee and further responsible for developing partnerships with fund managers through white labelling initiatives in differentiating themes and approaches. Prior to joining Banque Heritage in 2015, Mikaël has held various positions as a buy-side analyst, portfolio manager and sales trader, starting his career at Lombard Odier Darier Hentsch & Cie and engaging in a number of ventures prior to returning to investment management. Mikaël is a B.Com graduate from McGill University in Montreal and a CIFA charter holder.

PROGRAMME

Date **Vendredi, 20 Avril 2018**
LIEU Métropole, Quai Général-Guisan 34, Genève, Suisse
12h00 Enregistrement & networking cocktails
12h30 Conférence & Session Q&A
13h00 Début du repas
14h00 Fin de conférence

luncheon is
graciously offered by
Bluecap & Banque Heritage

Prière de vous inscrire avant le mercredi, 18 Avril 2018, par email: secretariat@gscgi.ch

Titre/Nom & Prénom	Position
Société	N° de participants
Tel N°	Email
Invité(s) (Nom, Société & email)	
Membre GSCGI/SAIFA	No, not yet!
Désire être informé(e) des futures conférences	Genève seulement
Prix par personne: Membres CHF 0.-	Non-membres CHF 0.-

Kindly wire funds to GSCGI, Post Finance, a/c 12-5991-3, IBAN: CH94 0900 0000 1200 5991 3, BIC POFICHBEXXX

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