

Wealth Management

Scenarios and Trends

Background

The challenges for Swiss Wealth Managers have increased. While global wealth keeps growing at a healthy pace, the importance of emerging markets continues to increase. In terms of offshore wealth centers, the USA and Luxembourg are catching up. Within Switzerland, the environment for wealth management remains fragmented and highly competitive. Profitability for most Swiss wealth managers has declined since the financial crisis, and growth opportunities in the traditional offshore business seem limited.

Current challenges for Swiss Wealth Managers

The wealth management industry is confronted with several uncertainties, most importantly, the client interaction model and the control of the value chain. While a final answer on where the industry may be heading is yet to be found, profit opportunities for wealth managers appear to be at risk in most scenarios.

Seminar overview

The seminar will explore the key megatrends shaping the future of wealth management: digitalisation, purpose-driven investing, democratisation of investments, higher standards and the increasing tendency of clients to switch providers or to exert pressure on fees.

The seminar will focus on the recent strategic moves of the leading Swiss players and derive general market trends and fields of action from them. Practical examples can serve as food for thought for future leaders and strategists in wealth management.

Finally, an approach to developing strategies for success for asset managers is discussed. These are necessary to be successful in the current difficult environment and to leave the competition behind.

Who should attend?

Financial analysts
Asset managers
Portfolio managers
IT specialists
Law and compliance experts
Financial market operators
Wealth managers
Client advisors

Language

English

Date

17.01.2023

Time

13:00 – 17:00

Place

Hybrid format, at Bildungszentrum Sihlpost, Sihlpoststrasse 2, 8004 Zurich and via Zoom.

Seminar fees

SFAA members' attendance is free of charge.
For non SFAA members the fee is CHF 480 including documentation.

Registration

Online on <https://www.sfaa.ch/en/agenda/event-registration/>

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Speaker



Dr. Christoph Künzle, CFA

Christoph Künzle is a lecturer for Wealth Management at Zurich University of Applied Sciences (ZHAW). He also serves as Director at Deloitte in Zurich where he focuses on strategic and operational advice for Wealth and Asset Managers. He has over 20 years of industry and leadership experience in financial services.

He has advised numerous reputed clients in Switzerland and worldwide and has acquired profound knowledge and expertise in strategy, digitalization, as well as large transformation programs.

Before joining Deloitte, he served in line management functions in Asset Management in Switzerland and Brazil. Chris began his career in top-tier strategy consulting at Bain & Co. in Munich and London, where he advised leading financial investors in M&A and value creation. He graduated in both Business Administration and Law at the University of St.Gallen (HSG). He is fluent in German, English and Portuguese.