

WEALTHTECH MATTERS

WealthTech Matters Switzerland - 2024

Thursday 7 November 2024, Sheraton Zurich Hotel, Pfingstweidstrasse 100, 8005 Zürich, Switzerland

Sponsors



Participant List

- **ACE & COMPANY**, *Partner Head of Investment Solutions ExCo Vice Chair*
- **AaraulInvest**, *Partner and Managing Director, Chairman of the Board of Directors*
- **Anker Capital Management**, *Portfolio Manager*
- **Arabella Group**, *CEO, Chairman*
- **Arabella Group**, *CEO*
- **Baseline Wealth Management**, *COO*
- **Belvoir Capital**, *CEO*
- **Cottonfield Family Office**, *Managing Partner*
- **Credit Suisse International**, *Business & Technology Solutions for External Asset Managers*
- **Credit Suisse International**, *Head of Wealth Management Middle East, Turkey, and Africa Client Onboarding and Reviews*
- **Feri Group**, *Director Portfolio Management Head of Global Equities and ESG & SDG*
- **Feri Group**, *Director Portfolio Management/ Head of Exponential Strategies & Special Investment Solutions*
- **Finad**, *Chief Technology Officer*
- **Flornoy & Associes Gestion**, *General Director*
- **Geneva Management Group**, *Chief Operating Officer*
- **Independent**, *Managing Director*
- **InvestSuite**, *Managing Director*
- **Julius Baer International**, *Head of Client Strategy and Experience for Switzerland and Europe*
- **Notz, Stucki & CIE**, *Chief Operating Officer*
- **Openwork Limited**, *Chief Operating Officer*
- **Piguet Galland & Cie**, *COO*
- **RAM Capital**, *CEO, Partner of Remaco, Head of Asset Management*

- **SingularityCE**, *Founder & CEO*
- **St James's Place**, *Partner & Senior Relationship Manager*
- **Stanhope Capital**, *Partner, Chief Investment Officer and co-head of Stanhope Capital*
- **Survista Asset Management**, *CEO, Client Advisor*
- **Teece Connection**, *CEO*
- **Toledo Capital**, *Managing Director - Wealth Management*
- **Tramondo Investment Partners**, *CEO*
- **UBS Partner Switzerland**, *M&A consultant*
- **UBS Wealth Management**, *Chief Operating Officer*
- **Valiant Bank**, *Head of Private and Business Customers*
- **Verium**, *Partner Wealth Management*
- **Woodman Asset Management**, *CEO*

FACILITATORS & SPEAKERS

- **Alpha FMC**, *Associate Director, Wealth Management Switzerland*
- **Alpha FMC**, *Director, Head Wealth Management Switzerland*
- **Alpha FMC**, *Global Head of Wealth Management*
- **Davies Group**, *Director*
- **FinArchitects**, *Managing Partner*
- **Independent Consultant**, *Consultant*

INDUSTRY BODIES, REGULATORS, ASSOCIATIONS AND GUESTS

- **Alpha FMC**, *Executive Director - Head of UK Wealth Management & Private Banking*