

December 5 and 6 2000, Le Richemond - Geneva

Jean-Pierre Cuoni
Chairman
EFG PRIVATE BANK SA, Zurich

Alexandre Zeller
Member of the Executive Board
CREDIT SUISSE PRIVATE BANKING

Philippe Theytaz
Director
PWC, Geneva
&

Ian Woodhouse
Director of the European Private Banking Practice
PWC, London

Jeff Sampler
Associate Professor of Information Mngt & Strategy
LONDON BUSINESS SCHOOL

Prof. Dr. Hermann Simon
Chairman
SIMON KUCHER & PARTNERS, Bonn
&

Dr. Meinhard Kneller
Director
SIMON KUCHER & PARTNERS, Zurich

Richard Lowrie
Principal, Business Innovation Services
IBM (EMEA), London

Werner Peyer
Head of Private Banking
COUTTS, London

Francois Debiesse
Head of Private Banking
BNP-PARIBAS GROUP, Paris

Jean-Pierre Cuoni
Chairman
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Albert Y. Gowen
CEO
GOWEN FAMILY OFFICE, Geneva

Nicholas P. Dale
Member of the Executive Committee
HSBC GUYERZELLER BANK AG, Zurich

Maurice Ephrati
Managing Director, UBPF FAMILY OFFICE
UBP, Geneva

Philippe Szkoloczny-Syllaba
Head Family Office
HERITAGE FINANCE & TRUST, Geneva

John Cotton
Managing Director
MERRILL LYNCH INVESTMENT MANAGERS, London

Joseph Field
Partner
BRYAN CAVE, London
&

Andreas Limburg
Partner
PRIVATE CLIENT PARTNERS, Zurich

Christian Sulger-Büel
Managing Director
SULGER BUEL & CIE, London

Pierre Gerbier
Managing Director Family Office
ROYAL BANK OF CANADA EUROPE LIMITED, London

Alain Mestat
Director
BANQUE PRIVEE EDMOND DE ROTHSCHILD
LUXEMBOURG, Luxemburg

Chairman Jean-Pierre Cuoni
EFG PRIVATE BANK SA, Zurich
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CREDIT SUISSE PRIVATE BANKING

The 6th annual Conference

INTERNATIONAL PRIVATE BANKING

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BNP-PARIBAS GROUP, Paris

From Product Sales To Client Advice
From Personal Banking to Family Office

Organised by:





Letter of President

Dear Executive,

The 6th annual International Private Banking Conference will this year reflect the fact that the Industry is being *pulled in many directions*:

“From Product Sales to Client Advice - From Offshore to Onshore - From Personal Banking to Family Office - New Technologies - New Distribution Channels - New Business Models...”

The conference has been *carefully designed* to address the *key strategic* issues for the industry with the objective to help you *review your options* and *redefine your priorities* to meet the challenges of this new competitive environment.

The panel of speakers has been *meticulously selected* to ensure the *highest level of content*.

They are from both *academic* and *professional* world, *active researchers* and *highly experienced top executives*.

This year event is an *outstanding opportunity* for CEO's, Managing Directors, Members of the Executive Board and seasoned Head of Private Banking to *meet and network* in a very professional environment to discuss and interact with an *exclusive think tank of experts* in a short time frame.

Looking forward to meeting you in Geneva,

I remain, Yours Faithfully


François Golbery
Chief Executive Officer
MGI (Switzerland) S.A.

Member of the Executive Board
CREDIT SUISSE PRIVATE BANKING
SUISSE PRIVATE BANKING

Alexandre Zeller
Member of the Executive Board

Tuesday december 5 - day one

APPLYING THE US STYLE PRIVATE BANKING APPROACH IN EUROPE

8.30 Registration – Coffee

9.00 Opening Remarks by the Chairman

Jean-Pierre Cuoni

Chairman
EFG PRIVATE BANK SA, Zurich

9.15 Keynote Address

Alexandre Zeller

Member of the Executive Board
CREDIT SUISSE PRIVATE BANKING

9.30 An Update on Recent Industry Challenges & Opportunities from PWC

- changing market and clients trends
- participant responses
- likely future for the industry

Philippe Theytaz &

Director
Private Banking
PWC, Geneva

Ian Woodhouse

Director of the European
Practice
PWC, London

10.15 Coffee-break

10.45 Strategic Consequences of the e-Private Banking

Jeff Sampler

Associate Professor of Information Mngt & Strategy
LONDON BUSINESS SCHOOL, London

12.00 Pricing Strategies in Private Banking

Prof. Dr. Hermann Simo &

Chairman
SIMON KUCHER & PARTNERS,
Bonn

Dr. Meinhard Kneller

Director
SIMON KUCHER & PARTNERS,
Zurich

13.00 Lunch

14.30 Multi Channel Strategy and Channel Development in Financial Services

Richard Lowrie

Principal, Business Innovation Services
IBM (EMEA), London

15.15 Outsourcing or not the Investment Products

Werner Peyer

Head of Private Banking
COUTTS, London

16.00 Afternoon tea

16.30 Merging and Integrating Private Banking Departments

- Clients
- Organisation and Systems
- Culture

François Debiesse

Head of Private Banking
BNP-PARIBAS GROUP, Paris

17.15 Applying the US Style Private Banking Approach in Europe

Jean-Pierre Cuoni

Chairman
EFG PRIVATE BANK SA, Zurich

18.00 Closing Remarks by the Chairman

Member of the Executive Board, Alexandre Zeller
CREDIT SUISSE PRIVATE BANKING, Chairman of the Exec
SUISSE PRIVATE BANK, Member of the Executive Board

Wednesday december 6 - day two

**MOVING FORWARD INTO
THE FAMILY OFFICE SERVICES**

8.15 Opening Coffee

8.45 Opening Remarks by the Chairman

Albert Y.Gowen

CEO
GOWEN FAMILY OFFICE, Geneva

9.00 Keynote Address "The Concept of Swiss Wealth Management"

Nicholas P. Dale

Member of the Executive Committee
HSBC GUYERZELLER BANK AG, Zurich

9.15 Challenges in Establishing a Multi-Family Office

- independence and objectivity
- confidentiality and security
- performance

Maurice Ephrati

Managing Director, UBP FAMILY OFFICE
UBP, Geneva

10.00 Approaching Differently the Family Office Concept

- Should all services provided to clients of the Family Office be billed to them?
- Should the services of the Family Office be integrated as part of asset management services or should they be kept separate & independent ?

Philippe Szokoloczy-Syllaba

Head Family Office
HERITAGE FINANCE & TRUST, Geneva

10.45 Coffee-break

11.15 Will the New "Cyber-Billionaires" have the same Requirements as their 20th Century Predecessors for the Management and Transmission of their Wealth ?

John Cotton

Managing Director
MERRILL LYNCH INVESTMENT MANAGERS,
London

12.00 Duties & Responsibilities of the Family Office

Joseph Field

Partner
BRYAN CAVE,
London

&

Andreas Limburg

Partner
PRIVATE CLIENT PARTNERS,
Zurich

13.00 Lunch

14.30 Recruiting for a Family Office

Christian Sulger-Büel

Managing Director
SULGER BUEL & CIE, London

15.15 The Multi-Client Family Office: A Real Independent Office or a Marketing Wrap?

- internal and external conflicts of interest

Pierre Gerbier

Managing Director Family Office
ROYAL BANK OF CANADA EUROPE LIMITED,
London

16.00 Practical Experience of the US Style Family Office and Transposition to Europe

Alain Mestat

Director
BANQUE PRIVEE EDMOND DE ROTHSCHILD
LUXEMBOURG, Luxemburg

16.45 Closing Remarks by the Chairman

17.00 Close of the Conference

A CAREFULLY SELECTED PANEL OF PROFESSIONAL EXPERTS

Jean Pierre Cuoni is Chairman of EFG Private Bank SA Zurich and a Director of EFG Bank European Financial Group, Geneva. Prior to these positions, Mr. Cuoni was CEO of Coutts & Co International Private Banking (1990-1994). He has a tremendous experience gained with Citibank where he spent 28 years over the world.

Alexandre Zeller is Member of the Executive Board of Credit Suisse Private Banking. He is responsible for the French speaking Switzerland area as well as the french countries, Africa, USA and Israel. He holds a degree in Business from HEC as well as from the International Bankers School in New York.

Philippe Theytaz is a Director responsible for the Private Banking sector of PricewaterhouseCoopers Management Consulting practice in Switzerland. He has been working with senior executives on a wide range of strategic and operational assignments in Switzerland, Luxemburg, France & Monaco. He holds an MBA from Boston College.

Ian Woodhouse is Director of the European Private Banking Practice division at PricewaterhouseCoopers. Ian helps the banking institutions to redesign their business models and translate them into practical operational and organisational terms. Ian Woodhouse is the lead author of the widely recognised PWC European Private Banking Survey.

Jeff Sampler is Associate Professor of Information Management and Strategy at the London Business School. He is also Visiting Professor at Wharton and is conducting research on the impact of internet in various industries including banking & Wealth Management.

Hermann Simon is founder and chairman of Simon, Kucher & Partners Strategy & Marketing Consultants, Bonn, Munich, Cambridge (Massachusetts), Paris, Vienna & Zurich. He is working within the banking sector on Strategic & Marketing assignments including pricing issues. He is a Permanent Visiting Professor at the London Business School.

Meinhard Kneller is a senior consultant with Simon, Kucher & Partners where he runs the Zurich office. His work focuses on the development of complex purchase behaviour and market simulation models. He holds a PhD in the field of theoretical plasmaphysics from the Max-Planck Institute in Bonn.

Richard Lowrie is Principal in charge of leading the IBM practice focus in financial services strategy and e-business across EMEA. He is a member of the IBM world-wide Thought Leadership group. Richard holds a MBA from Brunel University and is Associate of the Chartered Institute of Bankers in London.

Werner Peyer is Head of Private Banking of Coutts & Co in London. Prior to joining Coutts & Co, he has worked 15 years with Credit Suisse in various positions & countries including as Head of International Private Banking for the anglo-saxon clients. He graduated from the University of Zurich & the New York Institute of Finance.

François Debiesse is the Head of Private Banking at the BNP-Paribas Group. He joined Banque de Paris et des Pays-Bas in 1971 and is currently in charge of the Asset Management Department as well as Chairman of the Fondation Paribas. He holds a diploma from HEC and is Professor of Finance at ESLSCA, a private university of applied business sciences in Paris.

Albert Y. Gowen is CEO of Gowen Family Office. Prior to this, he co-founded Bank Sarasin Geneva as well as Coutts & Co in Switzerland. He has a long experience in Private Banking through various assignments around the world. He holds an MBA from IMD.

Nicholas P. Dale is Member of the Executive Committee of HSBC Guyerzeller Bank AG in Zurich where he heads the Trust and Legal Department in close co-operation with the private banking operation. He graduated from the College of Law in London and from the Swiss Banking School.

Maurice Ephrati is Managing Director of the UBP Family Office. Prior to this, Maurice has worked for seven years in a Family Business and has gained experience also as a Private Banker. He graduated as a lawyer.

Philippe Szokolocz-Syllaba is Head of Family Office at Heritage Finance & Trust Co. Prior to this, he co-headed the International Tax & Estate Planning Dept of Paribas (Suisse) SA and worked in several International Law Firms. He was admitted in both Paris & Geneva Bar as a lawyer and holds a European Certified Financial Analyst Diploma.

John Cotton is a Managing Director of Merrill Lynch Investment Managers with particular responsibility for Private client business development. He is a graduate of Oxford University and has spent his full career in asset management and private client work on the continent of Europe and United Kingdom.

Andreas Limburg is a founding member and partner of Private Client Partners, an independent Swiss company providing family office services to private clients. Andreas has specialised in Swiss legal & tax issues, offshore structuring, global estate planning as well as trust & litigation matters. He is a member of the Zurich Bar & holds a Master of Law from the London School of Economics.

Joseph A. Field is partner in the London Office of Bryan Cave LLP and heads the firm's European Private Client practice. In addition to concentrating on representing wealthy international families, he advises financial institutions on establishing trust & fiduciary services. He practices in Europe for 20 years and is a member of the California & District of Columbia Bars.

Christian Sulger-Büel is the founder & Managing Director of Sulger Buel & Cie, a European integrated Private Banking practice in executive search operating from a dual base in London & Geneva. He has built up his career through various assignments for Paribas including as Head of the Paribas Private Banking office in London. Christian holds both a Law and Political Sciences degree.

Pierre Gerbier is Managing Director for the Family Office of Royal Bank of Canada, responsible for the management of dedicated Family Office teams in London and offshore acting for and on behalf of European families in all day-to-day and strategic areas of service and advice. He holds a M.S. HEC degree in International Finance.

Alain Mestat has just joined Banque Privée Edmond de Rothschild in Luxemburg. Prior to this, he was the founder & Managing Director of Advena Management, Inc. acting as a US Family Office to high net worth international families and operating in Boston, Jeddah & Dubai. Alain holds a Masters in International Economics and Finance.

François Golbery is the founder & Chief Executive Officer of Management Global Information, a family business operating from Geneva and providing focused and innovative pan-european conferences for the banking top level executives. Prior to this, he co-founded and managed the Paris based office of Institute for International Research. He holds an MBA in Finance from the University of Hartford (Connecticut).

WHAT THE DELEGATES SAID ABOUT OUR LAST CONFERENCES

*“Well balance between current issues impacting the business,
specific bank business review and outlook on solutions
that should drive the business forward”*

George Crosby,
Managing Director
BANCO ITAU EUROPA LUXEMBOURG SA

“Well organised and informative”

Dr. El-Assadi
Head of Private Banking
CREDITANSTALT AG AUSTRIA

“It covered all the topics I am interested in”

Marco Manara
Vice Chairman
BANCO PROFILO SPA ITALIA

“well organised and good subjects”

Stephen Secrete
Strategic Expansion
MERRILL LYNCH INTERNATIONAL, LONDON

“Impressive guest list & great place for making contacts”
“Excellent organisation, impressive speakers and conferences”
“Very positive, high quality expert speakers”
“Provided a useful pointer to review strategic options”
*“Good cross-sector of private wealth management
senior executives represented”*

Registration Form

How to register

- By Phone : 41 22 319 69 00
 By Fax to : 41 22 319 69 01
 By Mail : MGI (SUISSE) SA
56, rue du Stand- CH-1204 Genève - Suisse
customer.service@mgi-direct.ch
 By E-mail :

Date and venue

Conference - 5 & 6 December, 2000 (C20030)
Le Richemond Hotel
Jardin Brunswick - CH-1201 Genève

Accommodation

MGI has negotiated preferential rates with a number of hotels close to the conference. Please call our Registration Desk on 41 22 319 69 00 for further details.

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Standard price: 245 CHF (+ VAT)
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Fee

A 50% discount will be granted for the second registration from the same company

Including refreshments, luncheon and a full documentation package, the fee for the conference of 5 & 6 December, 2000 is:

CHF: 2490.- (+VAT 7,5 %) FF: 10250.- (+VAT 7,5 %)
Flux: 62 900.- (+VAT 7,5 %) Euros: 1560.- (+VAT 7,5 %)

The fee for participating either the first or the second day only is 70 % of the two days fee.

A 10% discount will be granted for early registration and payment prior to July 1st

Payment

By bank transfer:

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Switzerland : Crédit Suisse, 1211 Genève 70,
Account n° 0251-362955-41
Account in Euro n° 0251-362955-42
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Cancellation policy

Cancellation up to one month before the conference will support an administrative charge of 10% of the fee. Prior to the one month the full fee is due but a substitute delegate may attend in your place if required.

International Private Banking

5 & 6 December, 2000 - Le Richemond Hotel - Geneva

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