

Forum Kapitalmarktinstrumente - Kapitalmarktfinanzierung

Deutschland | Österreich | Schweiz

Partner:

foreign banks.
in switzerland.

SFAMA
Swiss Funds &
Asset Management
Association

100 Jahre ESTV
«Steuern für die Schweiz»
100 ans AFC
«Contribuer pour la Suisse»
100 anni AFC
«Contribuire per la Svizzera»

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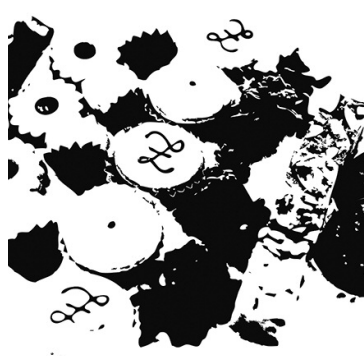
NZZ
Business
Events



12. Kapitalmarktforum

29th October 2015

Savoy Hotel Baur en Ville, Paradeplatz Zürich



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Prof. Joe V Bannister is Chairman of the Malta Financial Services Authority since 1999. He was Chairman of Malta Financial Service Center between 1995 and 1997. From 1990 to 1994 he was Chairman of the Malta's inward investment authority. After graduating in science from the Universities of Malta and Oxford (UK), he held positions at both Universities and the Cranfield Institute of technology (UK). He was Pro-Rector at the University of Malta from 2002 to 2006. He has served as Chairman of Tri-Med Fund Management Limited (1998 to 1999) and Mid-Med Bank Overseas Limited (1999). Prof Bannister is an independent director of a number of non-Maltese investment funds (hedge funds) on behalf of international institutions.



Alfred Brandner is head of structured solutions for Falcon Private Bank, Zurich and non-local conducting person for Falcon Fund Management Luxembourg. He started his career in Arthur Andersen. Afterwards he worked for Raiffeisen Capital Management Vienna, where he was responsible for Risk Management and IT. In 2002 he moved to Deka Bank Frankfurt, where he headed the back and middle office for Deka Investment and acted as managing director for Deka International Luxembourg from 2006 on. In 2008 he joined Falcon Private Bank. He holds a degree in business administration and was chairman of the Risk Management Group of BVI in Frankfurt and member of the risk management working group of ALFI in Luxembourg.



Markus Fuchs has been working in the fund and asset management industry since 1992. He built up and headed the Products & Fund Services team at Bank Hoffman. From 2000 until 2004 he headed the fund product management team of Swiss Life as CEO of Swiss Life Funds AG. He then joined UBS AG as a Managing Director where he had the overall responsibility for proprietary hedge fund products. In November 2010 he joined the Swiss Funds Association SFA as a Senior Counsel. In July 2013 he became the Managing Director of SFA, which since then operated under the name SFAMA. He obtained a degree in Economics from the University of Zurich and an Executive MBA from the IMD International Management Development in Lausanne.



Dr. Katja Gey ist seit 2011 Leiterin der Stabsstelle der Regierung des Fürstentums Liechtenstein für internationale Finanzplatzagenden (SIFA). Seit 2009 übte sie bereits die Funktion der Koordinatorin und Delegierten der liechtensteinischen Regierung für internationale Finanz- und Steuerverhandlungen aus. Davor war Katja Gey ab 1997 als diplomatische Mitarbeiterin beim Amt für auswärtige Angelegenheiten tätig. Katja Gey hat an der Universität St. Gallen Staatswissenschaften studiert und anschliessend promoviert. 2008 schloss sie den LL.M. an der Universität Zürich ab.



Charles Hermann ist bei der KPMG als Tax Partner tätig. Er führt die Financial Services Tax Gruppe und betreut Kunden aus dem Finanzsektor, insbesondere Investment Banken. Charles Hermann ist auf steuerliche Fragestellungen im Bereich Kapitalmärkte spezialisiert und hat umfassende Erfahrung in der Beratung von Schweizer sowie ausländischen Banken auf dem Gebiet der direkten und indirekten Steuern sowie internationalen Steuerfragen (QI, EU-Zinsbesteuerung). Bevor Charles Hermann zur KPMG stiess war er in einer anderen „Big Four“ Wirtschaftsprüfungsfirma in Zürich und London auf demselben Gebiet tätig. Charles Hermann besitzt einen Dokortitel in Wirtschaft der Universität Fribourg und ist ein Eidgenössischer Steuerexperte.



Adrian Hug arbeitete nach dem Jurastudium in Zürich als Auditor und a.o. Gerichtssekretär am Bezirksgericht Affoltern a.A. 1985 erwarb er das Anwaltspatent. Von 1985 bis 2001 war er für das Kantonale Steueramt Zürich tätig. 2001 wurde er zum Direktor des Steueramts der Stadt Zürich und seit 2007 zum Chef des Kantonalen Steueramtes gewählt. Seit April 2013 ist er Direktor der Eidgenössischen Steuerverwaltung. In seiner politischen Tätigkeit war Adrian Hug Mitglied des Gemeinderats der Stadt Zürich sowie des Kantonsrats des Kantons Zürich.



Ruedi Noser, Unternehmer und Nationalrat. Seit 1996 ist er Inhaber der Noser Gruppe, die heute mit ihren knapp 500 Mitarbeitenden zu den grössten ICT-Firmen der Schweiz gehört. Seine politische Karriere begann 1999 mit der Wahl in den Zürcher Kantonsrat. 2003 wurde er als Nationalrat in das Schweizer Parlament gewählt. Seit Dezember 2010 ist er Mitglied der Kommission für Wirtschaft und Abgaben (WAK). Heute präsidiert er die Kommission. Ruedi Noser ist Präsident des Swiss Innovation Park, einer Organisation welche Weltkonzerne mit ihren Forschungsabteilungen in die Schweiz bringen will. Weiter ist er seit 2010 Präsident von ICTSwitzerland.



Dr. Andreas Risi hat Lizentiatsabschlüsse in Wirtschafts-, Rechts- und in Politikwissenschaften der Hochschule St. Gallen und einen Dokortitel in Wirtschaftswissenschaften der Universität Zürich. Er begann seine Karriere als Steuerberater bei PricewaterhouseCoopers im Jahr 1992, wurde 2001 Partner und schloss sich 2008 der UBS an. Gegenwärtig ist er Leiter der Steuerabteilung für die Schweiz und EMEA. Er repräsentiert die UBS in den Steuerkommissionen der Schweizerischen Bankiervereinigung (Vorsitz) und der economiesuisse.



Paolo Tasca (PhD) is a financial economist specializing in P2P Financial Systems and Systemic Risk. He is the Co-Founder and Managing Director of the first Swiss-based digital currency exchange platform. He has a professional accountancy background and served as CFO and Member of the Board of Directors for different European and US SME's. He also has many years of stock and derivative trading. Currently, he works as Economist at Deutsche Bundesbank, is a Research Fellow of SAFE's Macro Finance area at CFS of Goethe University and Research Associate at the London School of Economics.



Maximilian Tomei has built his experience around hedge funds and private equity with a focus on commodities and real assets. He started his career in 1997 with Cargill International trading grains. From there he moved to Partners Group where he worked on customising hedge fund and private equity solution. In 2004 he co-founded Inoks Capital, a multistrategy commodity hedge fund, assembling momentum and trade finance strategies which he sold in 2008. Prior to joining Galena he was COO, Head of marketing and co-head of the executive board at RAM in Geneva. He holds a degree in International Relations with a major in International Law from the Graduate Institute of International Studies at the University of Geneva.

Executive Board

Dr. Alexander Lindemann
Raoul Würzler
Prof. Dr. Oliver Klein

Headquarter

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12. Kapitalmarktforum Schweiz

Thursday, 29th October 2015, Hotel Savoy Baur en Ville, Paradeplatz Zürich

Motto:

„Competition and Partnership among Financial Centres“

11:45

Registration & Sandwiches

12:30

Welcoming Address by the Forum's President

12:35

Key Note „Nationale Visionen“

Ruedi Noser, Unternehmer & Nationalrat, Präsident der Kommission Wirtschaft und Abgaben
Die Schweiz als Finanz- und Werkplatz - Wie können wir mit den Herausforderungen und
Opportunitäten erfolgreich umgehen?

13:15

Megatrends „FinTech“

„Will The Blockchain Technologies revolutionize the Financial Markets in 10 Years?“

In Hot Chair: **Paolo Tasca**, PhD, Co-Founder and CEO of the Bitcoin-Stock Exchange ECUREX
Switzerland & Senior Economist at Deutsche Bundesbank, Germany;
Interviewer: **Prof. Dr. Oliver Klein**, Prof. Klein & Von Stahl

14:00 - 14:30

Coffee Break

14:30

Key Note „Steuern“

Adrian Hug, Direktor, Eidgenössische Steuerverwaltung ESTV

Welche Auswirkungen haben die vielfältigen Steuerreformen für Finanzmarkt Schweiz:
Unternehmenssteuer-, Verrechnungssteuer-, Steuerstrafrechtsreform & Einführung
automatischer Informationsaustausch?

15:15

Panel Discussion „Impact of Tax Tsunami“

Government: **Dr. Katja Gey**, Head of Office for International Financial Affairs,
Principality of Liechtenstein

Bankier: **Dr. Andreas Risi**, Head of Tax Switzerland & EMEA UBS

Consultant: **Charles Hermann**, Partner KPMG

Moderator: **Dr. Alexander Lindemann**, Lindemann Rechtsanwälte

16:15 - 16:45

Coffee Break

16:45

Key Note „Asset Management“

Maximilian Tomei, COO, Head of Sales and Marketing, Galena Asset Management

Asset Management in Switzerland: The merging of commodities and asset management. Just a
viable counterbalance? Or an enhancement to the traditional wealth management industry

17:15

Panel Discussion „Asset Management“

Asset Management in Switzerland: strengths and weaknesses, opportunities in the global per
spective: what does the financial centre Switzerland need to become a global hub? where are
its major competitors? what are its assets?

Association: **Markus Fuchs**, Director SFAMA

Supervisor: **Prof. Dr. Joe Bannister**, Chairman MFSA Malta

Asset Manager: **Alfred Brandner**, Head Structured Solutions
Falcon Private Bank

Moderator: **Raoul Würigler**, Association of Foreign Banks in Switzerland

18:15

Apéro Riche

NOTE: The Conference is bilingual: presentations will be either in English or German,
questions can be asked in both English and German.

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Prof. Dr. Oliver Klein joined the Board of the Capital Market Forum in 2015. He has 13 years of professional experience in advising real estate investors in domestic and international tax matters. From 2010 to 2012 he was seconded to pwc's Jeddah office. He is an experienced real estate tax advisor who has assisted countless investors, structured various funds, developed investment strategies and was involved in numerous deals. Oliver holds an MBA from Vienna University, an LL.M. from Heidelberg University and a doctorate in law. He is a German qualified lawyer and tax advisor. Oliver is author of various publications, especially on tax and Islamic Finance subjects and is a lecturer at a private university in Frankfurt.



Dr. Alexander Lindemann is President of the Capital Market Forum Switzerland and Partner at Lindemann Rechtsanwälte. He advises investment funds, asset managers, private clients, investors and banks in legal, regulatory and tax matters. As a lawyer he is admitted in Switzerland, Luxembourg, Germany and Liechtenstein. In addition, he is a frequent speaker and publisher on capital market and tax issues. Alexander studied at University of Bayreuth, Julius-Maximilian University Würzburg and W&L School of Law in Virginia /USA. Alexander has worked in leading positions at PricewaterhouseCoopers, Credit Suisse & Clifford Chance before founding Lindemann Rechtsanwälte. He has been board member of a pension fund for many years.



Raoul Oliver Würigler is Vice-President of the Capital Market Forum Switzerland. He works for the Association of Foreign Banks in Switzerland since 2000 and is its Deputy Secretary General since 2001. In his function Raoul monitors current regulatory developments in the Swiss financial market regulation and assesses their impact on foreign financial intermediaries in Switzerland. Raoul is member of the Commission for Asset Management of the Swiss Bankers' Association and member of the board of a Geneva-based asset manager. Prior to joining the Association, Raoul worked in the corporate clients' department of a major Swiss bank. He graduated in politics from the University of Lausanne.

Mission Statement

Kapitalmarktforum Schweiz

Since financial markets connect the capital-seeking economy and profit-seeking investors, they are a vital component to economic growth and ultimately to the well fare of the whole society. Thus a well-functioning capital market contributes to a major extent to Switzerland's economic prosperity. It has become an important and integral part of our economy while connecting corporations, the public sector, consumers and investors, banks, insurance companies, security brokers as well as private or institutional asset managers, pension funds, foundations, family offices or other financial intermediaries. Furthermore, local authorities, the national bank and all other actors on the financial market are depending on its stability.

Unlike its stakeholders, financial markets do not have their own Forum. Thus, the main purpose of the Capital Market Forum Switzerland is to close this gap. The Forum connects decision-makers in a club atmosphere and enhances critical dialogue between stakeholders of the capital market, especially with regard to topics like capital market-capital market instruments and capital market funding.

Since the main purpose of the forum is the well-being of capital and financial markets, the club is politically neutral. By organising events and other activities, the Forum offers decision-makers to discuss current hot topics in a relaxed environment. For the greater good, the Forum aims to bring together opinion-leaders on capital market relevant topics.

In order to embrace the cross-border nature of the Forum, the events are held annually in Switzerland, Germany and Austria. In addition, a broad scientific board guarantees a strong basis of the Capital Market Forum Switzerland, being member of its European umbrella association.

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