



# **PRIVATE WEALTH NORDICS FORUM**

**MAY 26-27, 2021 | VIRTUAL**

Dear Colleague,

The 4th Annual Private Wealth Nordics Forum was developed as an education-focused, three-day virtual event for allocators and asset managers. The purpose of the meeting is to facilitate the dissemination of actionable investor content, coupled with supporting the continued development of the private wealth investment industry along the West Coast.

The program's agenda has been specifically designed to provide relevant and topical educational content for people who manage, advise, allocate to, or oversee private capital. 4th Annual Private Wealth Nordics Forum will offer exclusive access to the leading minds throughout the private wealth investment industry, who will in turn, provide the latest information and insight on the future of fixed income, equities, private debt, infrastructure, technology, allocation plans, and real assets investing.

We'd like to thank the program sponsors for their support of this investor-centric educational initiative.

The 4th Annual Private Wealth Nordics Forum will bring together hundreds of executives to discuss capital allocations into all sorts of investment vehicles. We have developed the program to meet the needs of private wealth investors such as private banks, family offices, consultants, and wealth managers.

We are looking forward to hosting you at the virtual conference!

Best regards,

Andres Ortiz  
Head of Production  
Markets Group

## VENUE INFORMATION

### Virtual Meeting

Attendees will watch the event on the Brella platform, **Brella.io**, you can register and join us as an attendee. Markets Group will share a **join code** with you once you have registered to Brella to begin networking.

Please login about 5 minutes before we start to learn the platform navigation and find the live stream broadcast which will be available in the agenda sessions.



## UPCOMING EVENTS

**Private Wealth Switzerland Forum**  
Geneva  
September 2021

**Private Wealth Benelux Forum**  
Amsterdam  
28 September 2021

**Private Wealth Germany Forum**  
Munich  
13 October 2021  
**Private Wealth Switzerland Forum**  
Zurich  
23 November 2021

## CONTACT INFORMATION

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## PLATINUM SPONSORS .....



Millions of people around the world rely on **Columbia Threadneedle Investments** to manage their money. We look after investments for individual, professional and institutional investors. Together, they entrust us with €447 (31 December 2020). All our clients have financial needs and goals, and our job is to do everything we can to help achieve them. We equip our investment professionals with the resources, tools and insights they need to achieve or surpass — the outcomes our clients expect. At the centre of every investment decision is a single goal — our clients' success. Your Success. Our Priority.

## GOLD SPONSORS .....



As a leading active asset manager with over 750 investment professionals in 25 offices worldwide, **Allianz Global Investors** manage €546 billion in assets for individuals, families and institutions. Founded in 1890, our parent company, Allianz SE, is one of the leading financial services providers worldwide with over 125 years of asset management expertise. In 2012 Allianz's asset management division was established to recognise two discrete investment management businesses, one of which is Allianz Global Investors.



**Global X ETFs** was founded in 2008. For more than a decade, our mission has been empowering investors with unexplored and intelligent solutions. Our product lineup features more than 80 ETF strategies. Explore our ETFs, research and insights, and more at [globalxetfs.eu](http://globalxetfs.eu) or [globalx-etfs.com](http://globalx-etfs.com)



**Prestige Funds** is part of the Prestige Group which was founded in 2007 and now consists of several companies. Each shares the common objective of providing genuinely alternative and innovative financial products and services that deliver consistent, positive investment returns — and which provide a genuine inflation hedge. We boast a diverse team of experienced professionals — many of whom came from senior positions within banking, finance and investment management. The team is spread across the UK and we have a strong regional presence to support our investment projects on the ground.



**Russell Investments** is a leading global investment solutions partner, dedicated to improving people's financial security. Russell Investments has £236.39 billion\* in Assets Under Management and works with over 1,800 clients globally, independent distribution partners and individual investors in 32 countries globally. As a consultant to some of the world's largest pools of capital, Russell Investments has £2 trillion\*\* in Assets Under Advice, Assets traded around £2 trillion and managed 197 transition events representing £66 billion through its Implementation Services business.



**SPDR ETFs** are a comprehensive family spanning an array of innovative and cost-efficient funds. As the asset management arm of State Street Corporation, we are the creator of the world's first ETFs and an indexing pioneer. With \$767 billion of Assets under Management in ETFs, our scale and global reach offer clients access to markets, geographies and asset classes, and allow us to deliver thoughtful insights and innovative solutions. For more information, visit [ssga.com/etfs](http://ssga.com/etfs)



**WisdomTree** was founded in 2006 with a passion for creating better ways to invest, by being the first investment manager to weight by dividends. We have never accepted the status quo and we think our investors shouldn't either. Since 2014, our European business has grown in terms of our product set and AUM. In April 2018, we completed the acquisition of ETF Securities' exchange-traded commodities, currencies and short and-leveraged business, including the world's first gold ETP. Today we're the biggest independent ETP provider globally and offer one of the most innovative ranges of ETPs, covering commodities, currencies, equities and fixed income.

## SPONSORS .....



Founded in 2005, **57 Stars** is a globally focused, independent alternative investment manager. With more than USD 4 billion raised and managed, the firm invests on behalf of leading institutions globally and seeks to generate superior risk-adjusted returns by investing in high-growth sectors of the global economy that are driven by secular tailwinds and technology adoption. 57 Stars seeks to provide investors with the combined benefit of operational leverage, an institutional investment platform, and the firm's track record of attractive returns, while supporting the growth of what is hoped to be best-in-class and highly impactful companies.



**Carlisle** is a leading, alternative assets investment manager. With deep experience and specialized expertise, Carlisle contributes a unique set of attributes that aid in discovering high-value and high-growth alternative investments that have limited correlation to both traditional and non-traditional asset classes. Our unique fund management solutions provide institutional investors, including pension funds, family offices, endowments, banks and governmental organizations, with tailor-made investment structures. We focus on delivering value, integrity, transparency and responsiveness.



**Carmignac** is an independent asset management firm established in 1989 on three core principles that still stand true today: entrepreneurial spirit, human-driven insight and active commitment. With a capital entirely held by the family and staff, Carmignac is now one of Europe's leading asset managers, operating from 7 different offices. Today, as throughout our history, we are committed to try harder and better to actively manage our clients' savings over the long-term.



**GSK Stockmann** is a leading independent European corporate law firm with over 200 professionals across our offices in Germany and Luxembourg. GSK Stockmann is the law firm of choice for Real Estate and Financial Services. In addition, we have deep-rooted expertise in key sectors including Funds, Capital Markets, Public, Mobility, Energy and Healthcare. For international transactions and projects, we work together with selected reputable law firms abroad. Our advice combines an economic focus with entrepreneurial foresight. That is what is behind: Your perspective



**Macquarie Asset Management (MAM)** is the asset management division of Macquarie Group. MAM is a full-service asset manager and offers private and public market strategies across both debt and equity solutions. The business manages \$414.6b, is a top 50 global asset manager and is the #1 infrastructure manager globally.



At **PGIM Investments**, we help meet the financial needs of investors by offering investment strategies across the global markets. We're part of PGIM, the global investment management business of Prudential Financial, Inc. (PFI) — a top-10 investment manager globally\*\* and a company that individuals and businesses have trusted with their financial future for over 140 years.

## SPEAKERS



**Mika Leskinen, Head of Responsible Investment, FIM**

Mika joined FIM Asset Management in 2018. He is a CIO with a deep understanding of responsible investing. Since 2000 Mika has managed several equity funds investing in several geographical areas. Responsible investing has been part of Mika's role for over 10 years. He chaired Finland's Sustainable Investing Forum in 2018 and is a member of a working group advising Church pension fund's (Finland) board on responsible investing.



**Miguel Tiedra, Head of Alternative Investments, Banque Cantonale Vaudoise**

Mr. Miguel Tiedra has been in charge of the Alternative Investment Team since 2006. He has extensive experience in primary analysis and portfolio management. Before joining BCV, he worked as a senior hedge fund consultant and senior sell-side analyst for a private bank in Geneva. He holds a degree in international relations from the Graduate Institute of International Studies in Geneva (IUHEI) and is a CFA charterholder, a Chartered Alternative Investment Analyst and a Financial Risk Manager.



**Lingyi Lu, Head of ESG, Söderberg & Partners**

Ms. Lingyi Lu is Head of ESG at Söderberg & Partners – a fast-growing company mostly active in financial advisory and asset management. As Head of ESG, Lingyi is responsible for the sustainability analysis and ratings of funds, life-insurance companies, unit-linked insurance companies and non-life insurance companies, distributed to clients, advisors and asset managers who integrate ESG aspects in their decision processes in various ways. Since the summer of 2019, Lingyi is also member of the board of Swesif – Swedish Forum for Sustainable Investing. Prior to joining Söderberg & Partners, Lingyi worked with the United Nations Development Program (UNDP).



**Jonas Thulin, Head of Asset Management, Erik Penser Bank**

Mr Thulin before joining Erik Penser Bank was Head of Asset Allocation at Nordea Bank Wealth Management. At Nordea he had other positions before this, such as Head of Strategy and Research Nordea Markets and Head of Global Alpha Strategy Nordea Markets. Before joining Nordea Mr Thulin worked at an investment bank in New York as Director and senior strategist for hedge fund strategies and trading, a similar position to the one he held in London before that. Mr Thulin started his career as teacher in economics at University of Queensland (Australia) and University of Stockholm (Sweden) and thereafter he managed Ericsson's pension trust.



**Johan Javeus, Chief Strategist and Head of Research, SEB**

Mr Javeus is the Chief Strategist and Head of Research at SEB.



**Andreas Sjöholm, Regional Manager, Confidentor**

Mr Sjöholm is a financial adviser, Regional Manager at Confidentor. With over ten years experience in the global family office segment, He has over the years gained extensive know-how regarding international taxation and how to invest gains in an international environment. He started his career within finance in 2006 entering the insurance industry and from that perspective he found a niche that carried me to New York where he built his base and expanded his own business customizing solutions for HNWI and UHNWI clients.



**Carl Barnekow, Chief Executive Officer, COIN Investment Group**

Carl Barnekow is CEO of COIN Investment Consulting Group. COIN is an independent consultant firm and have expertise and experience especially within alternative assets and building strategic portfolios. Barnekow has a background at SEB, where he spent 13 years at various positions within asset management.



## AGENDA .....

### Day 1 – May 26 – CET:

#### 12:35 Host's Welcome

Max Tattersall, Relationship Manager, **Markets Group**

#### 12:40 Panel: Opening Bell: Financial and Macro-Economic Outlook for the Next 12 Months

At first glance, the investment outlook for the next 12 months seemed to be straightforward. Growth was weak but steady until COVID-19 hit. Effects of the outbreak including severe downturn in China and elsewhere, restrictions of people, goods and services, and inhibiting supply chains lead to a forecast of a global recession. Geopolitical factors, such as the extent of policy shifts, the elections in the U.S. and Brexit continue to weigh in as a cause for caution. How do our panelists account for these and other factors that could affect their global investment and business decisions related to operating a wealth management organization? Our panelists will explain how they are putting these very macro and seemingly abstract ideologies into actual practice at the client level.

##### Moderator:

Jan Olsson, Chief Executive Officer Nordic Region, **Deutsche Bank AG**

##### Speakers:

Mobeen Tahir, Associate Director, Research, **WisdomTree**

Johan Javeus, Chief Strategist and Head of Research, **SEB**

Mats Hansson, Chief Strategist, **Nordea Wealth Management**

Andrew Pease, Global Head of Investment Strategy, **Russell Investments**

#### 13:10 Networking Break and One on One Meetings

#### 13:20 Morning Presentation: Global Sustainable Outcomes – Equity Investments for the Future

It's our belief that in a world of societal and environmental change, companies that invest and innovate for a more sustainable future not only support the planet and its inhabitants but also their own ability to generate returns. In the presentation Pauline will take you through how we, through the strategy, attempt to deliver both positive sustainable outcomes, in accordance with the UN Sustainable Development Goals (SDGs), and financial returns.

##### Presenter:

Pauline Grange, Portfolio Manager, **Columbia Threadneedle Investments**

#### 13:40 Networking Break and One on One Meetings

#### 13:50 Panel: Practical Steps Towards ESG, SRI, and Impact Investing Integration

The ESG discussion has evolved rapidly, as are techniques for incorporating ESG analytics and factors into the portfolio construction process. Despite the disruption caused by COVID-19, ESG continues to be a powerful tool and metric for developing investment strategies in many countries in Europe. This panel will explore how investors and managers are assessing ESG's longer-term material impacts and how they are positioning their portfolios to avoid potential risks. The panel will also examine specific strategies investors and managers are using to address and integrate impact investing strategies in ways that are profitable yet effective.

##### Moderator:

Mika Leskinen, Head of Responsible Investment, **FIM**

##### Panelists:

Fredric Nyström, Head of Responsible Investment, **Öhman**

Lingyi Lu, Head of ESG, **Söderberg & Partners**

Susanne Bolin Gärtner, Head of Fund and Manager Selection, **Danske Bank**

Morgane Delledonne, Director of Research, **Global X ETFs**

#### 14:20 Networking Break and One on One Meetings

## AGENDA .....

### 14:30 Panel: Fixed Income Realistic Expectations and Ways to Enhance Returns

Bond yields and spreads near historic low levels are currently fueled further by the outbreak of COVID-19. With this coupled with a slow-but-positive growth in the U.S. in comparison to other countries where risk is more prominent, where can opportunities in the fixed income markets today be sought? The aggressive efforts from the Federal Reserve to maintain liquidity run the risks of over-stimulation, and thus, inflation. What is the effect on bonds? With potential in credit markets, the opportunity in the floating-rate sector, the global market focus on politics, policy and crisis management, what role does fixed income play and what is a reasonable yield range to expect out of a balanced portfolio in the near future and long-term? Our panelists will discuss ways to improve returns and the potential risks ahead.

Moderator:

**Andreas Sjöholm**, *Regional Manager, Confidentor*

Panelists:

**Pär Magnusson**, *Chief Fixed Income Strategist, Swedbank*

**Giulia Pellegrini**, *Deputy Chief Investment Officer, Emerging Debt, Allianz Global Investors*

**Jason Simpson**, *Senior Fixed Income ETF Strategist, State Street SPDR ETFs*

### 15:00 Networking Break and One on One Meetings

### 15:10 Breakout Educational Peer-to-Peer Discussions - Session One

In the format of roundtables, small discussion groups are formed by topic. These sessions are peer-to-peer discussions to share viewpoints, test theories, ask questions and make connections. Each session's discussion is facilitated by a session moderator and joined by a limited number of attendees.

**Table 1 - (Allocators Only)** Sustainability post COVID

Hosted by: **Pauline Grange**, *Portfolio Manager, Columbia Threadneedle Investments*

**Table 2 - (Allocators Only)** Battery technology – A megatrend with accelerating investment potential

Hosted by: **Mobeen Tahir**, *Associate Director, Research, WisdomTree*

**Table 3 - (Allocators Only)** Flexible Investing—Deconstructing the Corporate Capital Structure to Optimize Client Outcomes

Hosted by: **Craig Reeves**, *Founder, Prestige Funds*

**Table 4 - (Allocators Only)** - Capturing the Potential of the Digital Economy

Hosted by: **Morgane Delledonne**, *Director of Research, Global X ETFs*

**Table 5 - (Allocators Only)** - Benefits of ESG Integration into Credit Exposure with ETFs

Hosted by: **Jason Simpson**, *Senior Fixed Income ETF Strategist, State Street SPDR ETFs*

**Table 6 - (Allocators Only)** Why Chinese Equities?

Hosted by: **Kathrine Husvaeg**, *Senior Portfolio Manager, Russell Investments*

### 15:50 Networking Break and One on One Meetings

### 16:00 Panel: How to Best Take Advantage of Opportunistic Alternative Investments

In the wake of COVID-19, market volatility is at an all-time high globally. In this, what impacts do our panelists see the virus

having on alternative assets in the near future? How are HNW advisors opportunistically looking at expected returns across the alternatives spectrum including private equity, hedge funds, and private debt? Which alternatives will generate meaningful risk-adjusted returns? How are advisors instilling crisis management and downside protections?

Moderator:

**Silva Hanell**, *Partner, Mercer*

Panelists:

**Mikael Haglund**, *Head of Manager Research and Selection, SEB*

**Craig Reeves**, *Founder, Prestige Funds*

**Henrik Mikkelsen**, *Managing Partner, Iridis AG*

**Oleksandra Polishchuk**, *Head of Business Development & Investor Relations, Carlisle*

**Steven Cowan**, *Managing Director and Co-Founder, 57 Stars*

## AGENDA .....

### Day 2 – May 27 – CET:

#### 12:35 Host's Welcome

**Max Tattersall**, Relationship Manager, **Markets Group**

#### 12:40 Panel: Global and Local Equities and Their Impact on Portfolios

The stock market has fallen significantly and continues fluctuation due to the outbreak of COVID-19. However, unlike the housing crisis of 2008, central banks are firm in their stimulus efforts. Our panelists will discuss sustainable process and actions that should be considered during the equity portfolios' management, including the performance approach. How do different political strategies and shifting economic models affect equity exposure in portfolios? How do advisors navigate slow revenue growth to alleviate the pressure on the equities market? Can Emerging Markets provide equity diversification?

##### Moderator:

**Antonio Curia**, Executive Director, **Wimmer Family Office**

##### Panelists:

**Kevin Thozet**, Portfolio Advisor and Member of the Investment Committee, **Carmignac**

**Raj Shant**, Managing Director and Portfolio Specialist, **Jennison Associates, a PGIM Business**

**Stefan Löwenthal**, Chief Investment Officer – Global Multi Asset, **Macquarie**

#### 13:10 Networking Break and One on One Meetings

#### 13:20 Panel: Evaluating Real Assets and Real Estate Investment Strategies

This panel examines the benefits and the drawbacks of real assets and real estate. With the effects of COVID-19, deal volume is lower across international markets. Could stock-market falls push up allocations to real estate? How can HNW investors extract returns from this asset class or how can they use real assets to reduce overall portfolio risk amidst the chaos? How are travel restrictions inhibiting deals? With the economic downturn comes pressure on global oil prices, less demand for natural gas and supply chain disruptions. How are investors incorporating real estate, infrastructure, oil and gas, opportunity zones and commodities into portfolios?

##### Moderator:

**Mark Baumgarten**, Chief Executive Officer, **Baumgarten Consulting**

##### Panelists:

**Jonas Thulin**, Head of Asset Management, **Erik Penser Bank**

**Marcus Peter**, Partner, **GSK Stockmann SA**

**Gilles Lafleur**, Head of Real Assets and Alternatives, External Products, **Nordea**

#### 13:50 Networking Break and One on One Meetings

#### 14:00 Breakout Educational Peer-to-Peer Discussions - Session Two

**Table 1 - (Allocators and Managers Only)** Scandinavian Investors investing via Luxembourg investment funds into worldwide targets – continuing success or increasing challenges

Hosted by: **Marcus Peter**, Partner, **GSK Stockmann SA**

**Table 2 – (Allocators Only)** The search for sustainability and alpha in a global emerging markets

Hosted by: **Giulia Pellegrini**, Deputy Chief Investment Officer, **Emerging Debt, Allianz Global Investors**

**Table 3 – (Allocators Only)** Commodities and energy transition: How to invest sustainably to contribute to Energy Transition and climate change mitigation?

Hosted by: **Michel Wiskirski**, Fund Manager, **Carmignac**

**Table 4 – (Allocators Only)** NEXT Economy: How disruptive companies are reshaping the equity landscape?

Hosted by: **Raj Shant**, Managing Director and Portfolio Specialist, **Jennison Associates, a PGIM Business**

**Table 5 – (Allocators Only)** Benefits of liquid real assets, hosted by Stefan

Hosted by: **Stefan Löwenthal**, Chief Investment Officer – Global Multi Asset, **Macquarie**

#### 14:40 Networking Break and One on One Meetings





## AGENDA .....

### 14:50 Panel: Family Office Views on Wealth, Risk and Investments

The geopolitical and financial worlds are changing rapidly and are requiring investors to reassess their allocation strategies. COVID-19 leads to a higher need for risk management. How do supply-chain issues and trading inhibitions affect wealth management moving forward? There has been a rise of investable wealth leading to more single and multi-family offices, along with technological advancements and market disruption. Now, family wealth is focused on preservation rather than growth. How are family offices adjusting their asset allocations and strategies? How are costs adjusted to improve returns? How are family offices managing non-asset allocation investments that are interest-driven by principals and finding that delicate allocation “balance”?

Moderator:

**Jauri Hakka**, Senior Advisor & Founder, **Widhaby Advisors**

Panelists:

**Carl Barnekow**, Chief Executive Officer, **COIN Investment Group**

**Heikki Luoma**, Director of Research, **Peritus Investment Consultancy**

**Alex Felman**, General Partner, **Felman Family Office**

### 15:20 Host's Closing Remarks

**Max Tattersall**, Relationship Manager, **Markets Group**