



# 14<sup>th</sup> Richmond PIMS Forum

Grand Resort Bad Ragaz  
2 – 3 November 2022



richmondevents

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## 14<sup>th</sup> Richmond PIMS Forum

### WHY should you attend the PIMS Forum?

The Richmond PIMS Forum is a unique event, designed to offer sophisticated 3<sup>rd</sup> party fund selectors with the opportunity to research new and innovative investment possibilities, from leading financial product and solution providers.

Pre-scheduled one-to-one business meetings and an outstanding conference programme allow you to:

- Discover new trends and ideas.
- Learn from experts and peers.
- Debate, evaluate and share key issues.
- Build strong, long lasting relationships.

### WHEN? 2–3 November 2022

The event starts on Wednesday morning and finishes on Thursday afternoon. Accommodation for Wednesday night is complimentary.

### WHO will be attending?

#### Delegates

Senior 3<sup>rd</sup> party fund selectors from private banks, insurances, family offices and independent asset managers.

#### Suppliers

Product and solution providers offering a broad range of investment opportunities and services, based on the requirements of the attending delegates.

#### Speakers

International experts in the fields of economics, investment strategy, product development and wealth management.

### WHERE? Grand Resort Bad Ragaz

Discover a sleek, sophisticated 5-star-venue nestled in an extraordinary environment. This resort offers a unique service and perfect atmosphere for intensive networking sessions.

### HOW will you spend your time at the forum?

You will create a personalised itinerary, tailor made to suit your needs and purposes. It will consist of:

#### Business Meetings & Mealtime Meetings

Delegates and suppliers will meet over pre-scheduled one-to-one meetings, each lasting 30 minutes, and at breakfast, lunch and dinner.

#### Cutting-Edge Conference Programme

Enhance your knowledge through our focused conference programme delivered by experts and innovative speakers on topics chosen by delegates.

#### Peer Networking

Use the opportunity to meet your industry peers outside business hours in the relaxing environment of the Grand Resort Bad Ragaz.

*“The Richmond PIMS Forum is a tremendous opportunity to meet and connect with world leading suppliers of financial products and peers.”*

*Andreas Gilgen,  
Bank Alpinum AG*





*“One of the most interesting and efficient events in Switzerland!”*

*Hagen-Holger Apel, DNB Asset Management S.A.*

## The Delegate Experience

The Richmond PIMS Forum is designed for senior decision makers from the wealth management and investment industry.

We offer a time efficient and effective platform over 1.5 days at the Grand Resort Bad Ragaz. A personalised itinerary gives you the opportunity to:

- Enhance your knowledge through our keynotes and first class conference programme.
- Build strategic relationships with providers of your choice in one-to-one meetings.
- Network with up to 120 senior representatives from private banks, family offices and independent asset managers.

**Attendance for delegates is free of charge – strictly by personal invitation only.**

*“In my opinion it’s the best format for connecting with high-quality suppliers and delegates, get new ideas and develop the own business perception.”*

*Carl-Luis Werner,  
Swissquote SA*

*“Really time efficient and personally.”*

*Daniel Frauenfelder,  
Thalmann & Verling Trust reg.*

## The Supplier Experience

One of the most important factors for many delegates who decide to attend is the opportunity to source and benchmark potential fund products and asset solutions.

If your business development strategy is meeting with these senior decision makers, the Richmond PIMS Forum offers you unrivalled new-business opportunities with the top end of the wealth management/investment industry:

- Access to 120 delegates, all senior 3<sup>rd</sup> party fund selectors.
- Pre-scheduled one-to-one business meetings with the delegates that have asked to meet you.
- The opportunity to participate in the conference programme through supplier and fund manager presentations.
- Small group meetings over mealtimes.
- Detailed profile information on each attending delegate.

*“An intensive but also efficient and valuable event with the opportunity to make many new business contacts that are otherwise difficult to access.”*

*Claudio Carcò, T. Rowe Price*

*“Effective and efficient 2 day forum where delegates take the time to meet suppliers.”*

*Lutz Preussler, Muzinich & Co.*





## Conference Highlights – Outlook

The conference programme will be shaped by the people whose views matter most – the audience. Conference topic ideas will be generated by discussions with delegates and leading industry experts during the changes of the year.

### Opening Keynote Address

The Richmond PIMS Forum offers an opening keynote on Wednesday and a morning keynote on Thursday to present you a general summary, a micro view to the actual situation in the investment industry and of the changes needs in asset management. It is a good chance to discuss the topics in your networking over the next days. We will touch relevant topics like fund strategies, asset allocation, blockchain, robot advisory and crypto finance which help you to develop your business during the conference sessions.

### Conference

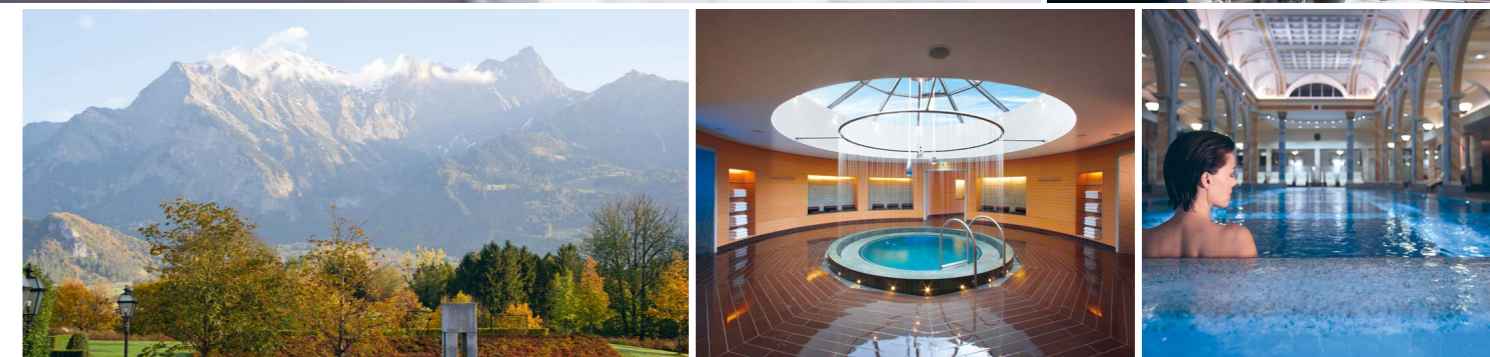
The programme will be designed to include an interactive exchange of information on hot topics and latest trends which will inspire attendees, provide them with new ideas and key points to take away and implement within their organisations. The conference programme will consist of work-shops, think-tanks and personal development sessions based on feedback from our attending delegates.

### Discussion Group

Several discussion groups will feature small numbers of senior professionals based on key themes. All group sessions will be led by expert moderators to give a high-level view of the industry, offering ideas and insights to help develop new strategies and goals.

### Supplier & Asset Manager Presentations

All suppliers have the chance to submit a supplier and a fund presentation. Delegates will evaluate and choose those presentations of most interest and relevance to them. The highest-rated presentations will be included in the conference programme and be detailed in the delegate itineraries.



*“A very good use of time and an excellent set of relevant meetings.”*

*Rachel Hill, Dragon Capital*

*“Great invested time and great benefit to meet suppliers and other participants. Top standard.”*

*Rene Weber, EW AM*

The 14<sup>th</sup> Richmond PIMS Forum 2022 will host over 220 senior investment professionals, industry experts and peer group providers spending their time developing their personal networks.

**We look forward to welcoming you at the Grand Resort Bad Ragaz in 2022.**



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**Following the success of our event format we anticipate a maximum of 50 supplier and 120 delegate companies. We encourage all companies interested in attending to contact us at their earliest convenience.**

**[www.richmondpimsforum.com](http://www.richmondpimsforum.com)**

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is organised by

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