



# 15<sup>th</sup> Richmond Finance Summit

Beau-Rivage Palace Lausanne  
5–6 October 2023



richmondevents

LONDON | NEW YORK | MILAN | BASEL



*“Very well organized and good level conference. The timing allows a maximum of contacts and information.”*

*Antoine Lakah, LM Capital*

*“Very structured event – good meetings and networking.”*  
*Sebastien Mayer, BNP Paribas AM*



## 15<sup>th</sup> Richmond Finance Summit

### WHY should you attend the event?

In a rapidly evolving financial landscape the Richmond Finance Summit is a unique event, designed for the key decision-makers and supplier companies of the wealth management and investment industry. Pre-scheduled one-to-one business meetings and an outstanding conference programme allow you to:

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

### WHEN? 5–6 October 2023

The event starts on Thursday with a keynote, following a business lunch and finishes on Friday early afternoon. The accommodation for Thursday night is complimentary.

### WHO will be attending?

#### Delegates

Senior decision-makers from leading banks and other financial institutions in Switzerland and Luxembourg. Senior 3<sup>rd</sup> party fund selectors from private banks, family/wealth offices and independent asset managers.

#### Suppliers

Based on the requirements of the attending delegates, the suppliers at the event will be offering a broad range of solutions including:

- Companies offering services & products on how to operate your financial institution.
- Companies offering a broad range of investment opportunities.

#### Speakers

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

### WHERE? Beau-Rivage Palace Lausanne

Considered to be one of Europe’s finest hotels, the Beau-Rivage Palace remains true to its traditional values while at the same time constantly breathing new life into the hotel. Nestling in 4 hectares of gardens on the shore of Lake Geneva and with a view of the Alps, this elegant five star hotel 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. It will consist of:

#### Business Meetings & Mealtimes Meetings

Meet the decision-makers of your choice in prescheduled one-to-one meetings, each lasting 30 minutes, or meet them for mealtimes over breakfast, lunch or 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 Beau-Rivage Palace.





*“A great way to catch up with existing and potential customers in an idyllic setting.”*

*Florence Aubry, Schroders*

## The Delegate Experience

The Richmond Finance Summit is designed for senior decision-makers from the financial industry.

We offer you a time-efficient and effective platform during 1.5 days at the prestigious Beau-Rivage Palace in Lausanne. A personalised schedule 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.
- Peer networking with up to 120 senior representatives from banks, family/wealth offices and independent asset managers.

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

*“Perfect framework with impeccable organization. Very good choice of speakers/themes for general presentation.”*

*German Grunauer,  
GGd Patrimoines Privés SA*

*“Probably the most effective business event to meet new vendors and peers in the wealth management industry in Switzerland.”*

*Snir Glikzman,  
Spring Investments SA*

## The Supplier Experience

One of the most important factors for many delegates who decide to attend is the opportunity to source and benchmark potential product and solution providers in financial operations and investment banking.

If your business development strategy is meeting with these senior decision-makers, the Richmond Finance Summit offers you unrivalled new business opportunities with the top end of the financial marketplace:

- Access to 120 delegates, key decision makers from leading banks and major financial institutions in Switzerland and Luxembourg included 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 chance to participate in the conference programme with a supplier presentation.
- Small group meetings over mealtimes.
- Detailed profile information on each attending delegate.

*“Quality of the exchanges and the people met. A great opportunity to meet decision-makers in French-speaking Switzerland.”*

*Stephanie Sainte Mareville,  
BearingPoint Switzerland AG*

*“High level business focused networking in a professional format and environment.”*

*Stephanie Kieninger,  
Smart Communications*





## 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 course of the year.

### Opening Keynote Address

The Richmond Finance Summit offers an opening keynote on Thursday and Friday morning keynote to present you a general economic summary, a micro view to the actual situation in the banking industry and an outlook of future matters. All the contents of the key address could be a chance to discuss later in peer to peer networking, in the sessions or the one-to-one meetings with suppliers.

### 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 workshops, think-tanks and personal development sessions based on feedback from our attending delegates.

### Discussion Group

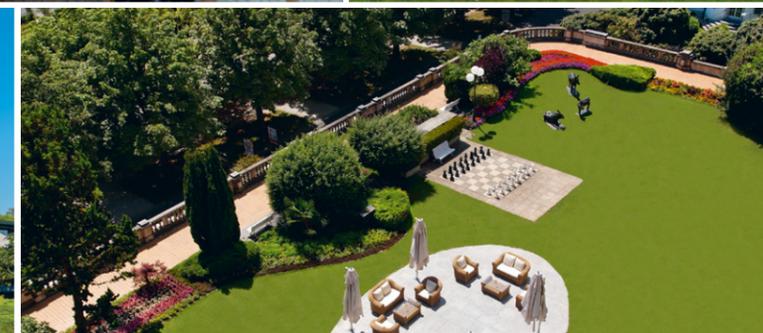
Several discussion groups will feature small numbers of senior professionals based on key themes. All group sessions will be led by expert moderators to give a high-level view of the industry, offering ideas and insights to help develop new strategies and goals.

### Supplier Presentations

All suppliers have the chance to submit a supplier 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.

### Out of the box

Always a great way to think in a different matter – get new experience and use this way as an advantage in your business environment!



*“Richmond Summit strikes the perfect balance between business conversations, genuine networking and inspirational talks. One always comes out of it enriched and with a more strategic take on many relevant topics. The environment sets the highest standards of hospitality, which makes the intense days fly in the smoothest most pleasant way.”*

*Loredana Hormuth,  
Lombard Odier*

The 15<sup>th</sup> Richmond Finance Summit 2023 will host 200 senior financial professionals from the financial operations and asset management, spending their time developing their personal network.

**We look forward to welcoming you at the 15<sup>th</sup> annual Forum in the Beau-Rivage Palace in October 2023.**



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**Following the success of our event format, we anticipate 40 supplier- and 120 delegate companies. We encourage all companies interested in attending to contact us at their earliest convenience.**

[www.richmondevents.ch](http://www.richmondevents.ch)

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