



WEALTH MANAGEMENT FOR WEALTH OWNERS

Fundamentals for owners of wealth to make
better investment decisions



FUNDAMENTALS OF FINANCE AND WEALTH MANAGEMENT FOR BETTER DECISIONS.



Since 2015 we have worked with wealth owners with our collaborators at University of Zurich, Harvard University and MIT. It has become evident that many wealth owners desire a practical training on wealth management and finance tailored to their specific needs, provided on an independent university platform.

This is what this globally unique program offers: to empower wealth owners through the provision of practical training on the fundamentals of finance and wealth management to confidently engage with their wealth.

Ultimately, the program supports responsible wealth owners to come to better investment decisions, to feel more comfortable with those decisions and in speaking about them with advisors and other investors, and to achieve better results.

We are looking forward to welcoming you at our Campus in the Rheingau, Germany's beautiful winery destination overlooking the Rhine river, 30 minutes from Frankfurt.

Falko Paetzold

*Prof. Dr. Falko Paetzold
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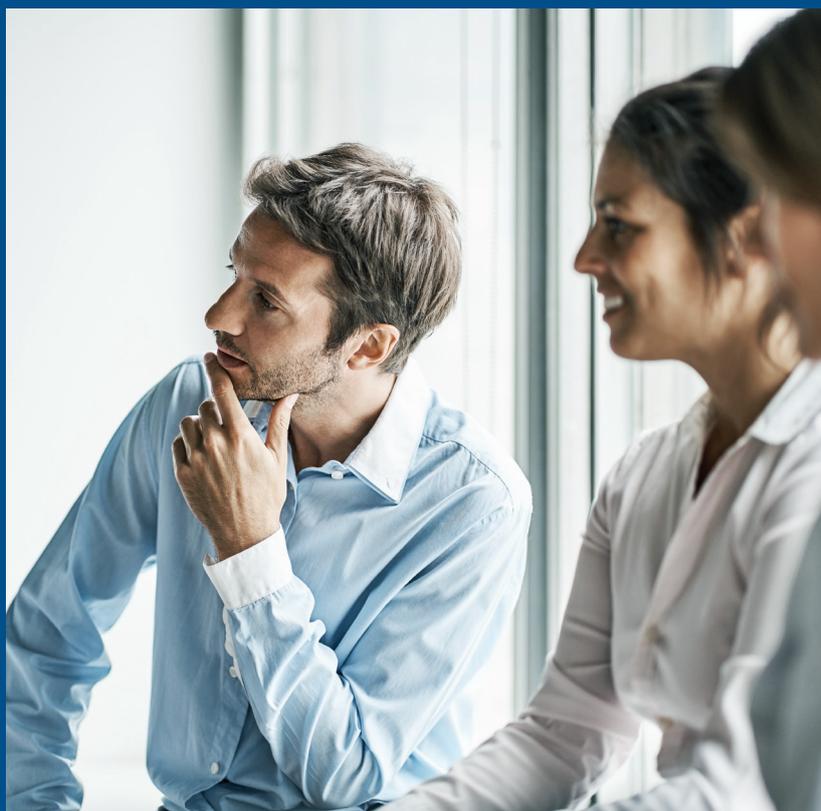
FOCUS ON KEY CONCEPTS OF WEALTH MANAGEMENT: GUARANTEE FOR SUSTAINABLE RESULTS.

Substantial amounts of wealth come with increased responsibilities. But many individuals that are in the situation of ownership for substantial amounts of private wealth feel insecure or insufficiently knowledgeable about the concepts and language in finance and wealth management. And they don't want to rely solely on external advice.

Wealth owners want to be able to feel fully in control and ownership over their wealth, to interact confidently and comfortably with finance and wealth management professionals, as well as (potential) investees, and last but not least to ultimately allocate their capital in line with their own needs and desires, including their desires in regard to impact and sustainable investing.

PROGRAM CHARACTERISTICS

- Addresses explicitly the needs of wealth owners and provides practical training on the fundamentals of finance and wealth management that will enable wealth owners to confidently create impact with their wealth.
- Only program globally that is open exclusively for wealth owners, on the topic of applied foundations in finance and wealth management, in a protected and conflict of interest-free university environment (strictly non-solicitation; wealth-owners only).
- Combines excellence in teaching and research that only a university provides, with the practical experience on-the-ground that only real-world private impact investors can understand and contribute.
- Developed and runs in partnership with the key networks in impact investing and private wealth globally and has a focus on positive impact ingrained throughout.



THE CURRICULUM: PRINCIPLES OF WEALTH MANAGEMENT.

Uniquely, the perspective of the wealth owner is at the center in all subject topics. Hands-on exercises and real-world case studies presented by wealth owners make each topic tangible from a wealth owner perspective. Participants learn “what do I need to know here, and what not”, and “what does this mean, for real, for myself in my own decisions”.

The “Wealth Management for Wealth Owners” program will focus on these topics:

SETTING THE STAGE. FOUNDATIONS OF FINANCE.

The program starts with an overview of financial markets.

The understanding of financial markets and their different characteristics will enable wealth owners to make the right decision **where to invest** their wealth. It centers on key asset classes, markets and its indices as well as instruments for investment.

- Finance and Money – Historically, today and tomorrow
- Company Perspective
- Asset Classes
- Markets
- Indices
- Instruments

FOUNDATIONS OF WEALTH MANAGEMENT. (IMPACT) PORTFOLIO CONSTRUCTION.

Wealth owners are confronted with the question **with whom to invest** their wealth. The second part of the program provides an overview of the wealth management industry, its actors and market participants as well as key characteristics of product and service offerings.

- Industry Overview and Operations
- Actors, Interrelations and Incentivisation
- Market Participants
- Offerings and Fees
- Private Wealth Management Process

HOW TO SELECT (IMPACT) INVESTMENTS. MAPPING KEY FUTURE TRENDS PER INDUSTRY.

The final part of the program focusses on **bringing it all together**:

First, looking into a portfolio approach and selecting investments. Working through how a single family office developed, over time, its structure and its approach to evaluate and filter (impact) investment opportunities. Showing and applying templates and real-work examples.

Second, diving into the key frameworks to unpick implications of major trends and to identify and evaluate underlying investment opportunities. Application of the frameworks to specific key topics.

- Refining your strategy
- Selecting investment
- Defining impact topics and uncovering implications and related investments

PROGRAM STRUCTURE

DAY 1

Fundamentals of Finance and Wealth Management – lectures, workshops, discussions

DAY 2

Looking under the hood of how two real-world family offices operate, in detail. Exploring all the aspects wealth owners should know and consider – also those never discussed.

DAY 3

Key topics to consider for your way ahead – understanding the known and hidden power-dynamics and incentives in wealth management, your own role, and how to find the right support.

THE SPEAKERS: EXPERTS IN THEIR FIELD.

The quality of the “Wealth Management for Wealth Owners” program is mainly based on its expert speakers. Besides academics renowned practitioners with long business experience in the wealth management sphere.

Additionally, an expert panel consisting of leaders in the private wealth space including the stakeholders of the “Impact Investing for the Next Generation” program provides periodical inputs and support in designing and implementing the “Wealth Management for Wealth Owners” program.

ACADEMIC DIRECTORS

Prof. Dr. Falko Paetzold

Assistant Professor for Social Finance & Head of EBS Impact Institute, EBS Business School, EBS Universität für Wirtschaft und Recht, Oestrich-Winkel/Wiesbaden, Germany

Managing Director, Center for Sustainable Finance and Private Wealth (CSP), University of Zurich

Prof. Dr. Rolf Tilmes, CFP

Academic Director Finance, Wealth Management & Sustainability Management, EBS Executive School, EBS Universität für Wirtschaft und Recht, Oestrich-Winkel/Wiesbaden, Germany

EXPERT PANEL

Samuel Bonsey

Co-Founder & Executive Director, The ImPact, New York, USA

Robert Boogaard

Managing Director, PCG Investments, Loosdrecht, Netherlands

Julie Engelhorn

CEO, Pollex GmbH, Hamburg, Germany

Temple Fennell

Co-Founder & Managing Director, Clean Energy Ventures, Cambridge, USA

Paolo Fresia

Investment Director, 100% Sustainability, London, United Kingdom

Dr. James Gifford

Head of Impact Investing, Credit Suisse, Singapore, Singapore

Senior Fellow, Center for Sustainable Finance and Private Wealth (CSP) at University of Zurich, Zurich, Switzerland

Dr. Caroline Grau

Director, Telepaxx Medical Data GmbH, Büchenbach, Germany

Prof. Dr. Tobias Gutmann

Assistenzprofessor für Produktinnovation, EBS Universität für Wirtschaft und Recht, Wiesbaden, Germany

Dr. Jason Jay

Director, Sustainability Initiative, MIT Sloan School of Management, Cambridge, USA

Senior Lecturer at the MIT Sloan School of Management, Cambridge, USA

Prof. Rasa Karapandza, Ph.D.

Prodekan Lehre EBS Business School, EBS Universität für Wirtschaft und Recht, Wiesbaden, Germany

Dr. Charly Kleissner

Senior Impact Advisor

Board Member, CSP North America

Co-Founder, Toniic Institute, San Francisco, USA

Chairman of the Board, ImpactAssets, Bethesda, USA

Advisory Board, Global Hub Company, Vienna, Austria

High Level Advisory Board, UNDP SDG Impact Finance, New York, USA

Moritz Kortekangas

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Fernando Scodro

Co-Founder & Member of the Board of Directors, The ImPact, New York, USA

Cofounder and Principal, Grupo Baobá, Rio de Janeiro, Brazil

Fellow, Center for Sustainable Finance and Private Wealth (CSP) at University of Zurich, Zurich, Switzerland

Kristin Siegel

Head EMEA and Director of the 100% Network, Toniic Institute, Munich, Germany

David Wood, Ph.D.

Director & Adjunct Lecturer in Public Policy, Initiative for Responsible Investing, The Hauser Institute for the Civil Society at the Center for Public Leadership, Harvard Kennedy School, Cambridge, USA

PARTNERS OF THE WEALTH MANAGEMENT FOR WEALTH OWNERS PROGRAM.

THE IMPACT

The ImPact was launched in 2016 by a group of visionary families committed to aligning their assets with their values. The purpose is to improve the probability and pace of solving social and environmental problems by increasing the flow of capital to investments that generate measurable impact. ImPact members help each other develop stronger impact investment strategies.

The ImPact regularly publishes primers, case studies, and guides to impact investing best practices. The ImPact also continuously create new member-only tools and resources that families can use to advance in their own impact investing journeys.

www.theimpact.org

toniic

The Toniic Institute is a global community of asset owners seeking deeper positive net impact across the spectrum of capital. Its members consist of more than 400 high net worth individuals, family office, and foundation asset owners who are deepening their impact across the spectrum of capital and personal resources in more than 25 countries around the world.

Impact investing is pioneering work. Practitioners can benefit from Toniic's support, community and resources as it supports the global impact investing ecosystem by offering freely available public goods through field building activities, in partnership with other industry leaders.

www.toniic.com

CSP Center for Sustainable Finance & Private Wealth

Center for Sustainable Finance and Private Wealth (CSP) is an academic research and teaching institution at the Department of Banking and Finance at the University of Zurich. CSP is unique in its position at the intersection of research and training, bridging scientists, wealth owners, and investment professionals in order to generate knowledge and to mobilize capital toward impact.

CSP's mission is to mobilize private wealth to achieve the targets set by the United Nations Sustainable Development Agenda 2030 and to limit global warming to 1.5 degrees Celsius.

CSP's vision is that the entire portfolio of every wealth owner fully advances sustainable development, and that the decisions leading to these investments are supported by evidence to maximize positive impact.

www.csp.uzh.ch



YOUR STEPS TO SUCCESSFUL WEALTH MANAGEMENT.

1

ADMISSION REQUIREMENTS

In order to ensure a trusted, non-pitch environment of like-minded peers, the program is open only to wealth owners. Participants enter through the communities from The ImPact, toniic, CSP, and via direct conversations.

2

APPLICATION

Please contact the Academic Director Prof. Dr. Falko Paetzold to learn more about the program and to apply, copying his colleague Violetta Sulzbach:

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violetta.sulzbach@ebs.edu

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DATES OF THE 2ND INTAKE

Program Opening and Lectures:
Wednesday, September 28th, 2022 to Friday,
September 30th, 2022

TUITION FEES

The fees of the „Wealth Management for Wealth Owners” program total 4,500 EUR.

The tuition includes all lectures, documentation and catering as well as evening events.

The tuition does not include accommodation nor logistics.



**EBS UNIVERSITÄT
FÜR WIRTSCHAFT UND RECHT**

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