

Creating and Preserving Wealth for Private Clients: A Global Challenge

9–10 March 2004, Kongresshaus, Zurich, Switzerland

AIMR Members and CFA® Candidates: US \$1195*

Nonmembers: US \$1495*

***Register by 15 January and receive a US\$150 discount**

To register for both the AIMR conference and the 8 March Research Foundation seminar

AIMR Members and CFA® Candidates: US \$1395*

Nonmembers: US \$1695*

***Register by 15 January and receive a US\$100 discount**

Food and beverage costs for the conference are estimated to be 15% of registration fees. Estimated dollar value of food and beverage cost per registrant will be noted on the confirmation receipt.

To register by fax or mail, complete the following form, fax to: +1 434-951-5398, or mail to: AIMR Conferences, P.O. Box 3668, Charlottesville, VA 22903-0668, USA. To register by phone call +1 434-951-5500.

See registration/cancellation policies under "Conference Registration Information."

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Creating and Preserving Wealth for Private Clients: A GLOBAL CHALLENGE

AN AIMR EDUCATIONAL CONFERENCE

9–10 March 2004

Kongresshaus

Zurich, Switzerland



This conference qualifies for credit under the guidelines for the Professional Development Program. If you are an AIMR member, your participation at this conference will be automatically entered in your PD Diary. Please see www.aimr.org/pdprogram for more information.



AIMR is bringing its annual private wealth management conference to Zurich in 2004. The conference will focus on private wealth management issues that impact managers around the globe charged with creating and preserving wealth for private clients.

The global private wealth management industry is currently in a major state of flux arising from substantial structural and market change. The conference speakers will thus address both the challenges and the opportunities presented in such an environment. Finding tax-efficient strategies and vehicles that provide effective tax planning is of paramount importance for clients and their managers, and increasingly so in the European arena as more assets are declared and repatriated. As the drive for after-tax performance continues, risk management of global private client portfolios, particularly those holding hedge funds and alternative investments, proves a central element in portfolio management decisions.



**The conference moderator is Anthony H. Cagiati, CFA
Managing Director
International Private Banking
Bank Leu Ltd., Zurich**

The topics and speakers will include:

**Private Wealth Management:
New Factors for Success in
a Changing Global Environment**

Ian Woodhouse
*Co-Leader of the Private Banking
and Wealth Management Practice*
IBM Business Consulting Services
London, United Kingdom

Equity Management for Taxable Investors

David M. Stein
*Managing Director and
Chief Investment Officer*
Parametric Portfolio Associates
Seattle, Washington, USA

**Diversifying Concentrated Wealth:
The Client's Perspective**

Rainer-Marc Frey
CEO
RMF Investment Management
Pfäffikon, Switzerland

Alexander Scott
Chairman
Sand Aire Investment Management Ltd
London, United Kingdom

Insurance Solutions for Private Clients

Benno K. Raeber
Partner
swisspartners Investment Network AG
Zurich, Switzerland

**Dealing with Undeclared Assets:
Addressing the Needs of Families
and Their Advisors**

Philip Marcovici
Partner
Baker & McKenzie
Zurich, Switzerland

Nicolas Merlino
Partner
OBERSON & Partners
Geneva, Switzerland

For the latest information on this conference and the speakers, please go to www.aimr.org/conferences/04private_wealth.html.

If you are interested in this conference, you may also be interested in attending *Asset Allocation Strategy for Private Clients: Closing the Literature Gap*, a half-day seminar sponsored by The Research Foundation of AIMR, International Center FAME, and the Swiss Banking School in Zurich on 8 March 2004. For more details please go to www.aimr.org/conferences/04private_clients.html.

**Best Practices in Risk Measurement and
Management for Private Client Portfolios**

Stan Beckers
Chief Investment Officer
Kedge Capital Partners
London, United Kingdom

**Risk Management Strategies for
Portfolios of Alternative Investments**

Alexander M. Ineichen, CFA
*Managing Director and
Global Head of AIS Research*
UBS Warburg
London, United Kingdom

**Guiding Private Clients in Selecting
the Optimal Portfolio**

Thomas Weber
Partner and CEO
LGT Capital Partners
Pfäffikon, Switzerland

Bodo Vogt
Professor
University of Magdeburg
Magdeburg, Germany

**The Family Office: Exploring the
Alternatives from the Wealthy Family's
Perspective**

Ian Partridge
President
Loedstar S.A.
Geneva, Switzerland

The Future of Private Banking

Patrick Odier
Managing Partner
Lombard Odier Darier Hentsch & Cie
Geneva, Switzerland

CONFERENCE REGISTRATION INFORMATION

Payment is due at time of registration. Forms received without payment will be confirmed on a space-available basis when payment is received. All fees are payable in U.S. funds. Confirmation letters will be mailed within two weeks of receipt of your paid registration. *Attendance is limited — please register early.*

HOTEL INFORMATION AIMR is recommending the following hotels located within close walking distance of the Kongresshaus Zurich AG: Arabella Sheraton Neues Schloss, Hotel Ascot, and Hotel Glarnischof. For details about reservations, please visit our conference web site at www.aimr.org/conferences/04private_wealth.html.

SPECIAL NEEDS Please contact AIMR for services to accommodate a disability or if you have any dietary restrictions. (Please include this information when you register for the conference.)

CANCELLATION POLICY A cancellation fee of US\$150 applies for all cancellations received after **2 March 2004**. No refunds will be issued for any cancellations received within **24 hours of program start**. Substitutions from the same company are accepted with fee adjustment, if appropriate. Sharing of registrations is not permitted.

YOUR REGISTRATION FEE COVERS A notebook containing extensive conference materials, continental breakfasts, refreshment breaks, luncheons, reception, and opportunities to meet with investment colleagues from throughout the world.