

2019

FARAD

FINANCE
FORUM

THE GREEN OCEAN TSUNAMI

HOW AND WHY SUSTAINABILITY WILL DRIVE THE
FUTURE OF THE ASSET MANAGEMENT, FUNDS &
INSURANCE INDUSTRIES?

Chamber of Commerce,
Luxembourg

March 19th 2019

8:30 - 19:00

Followed by a networking cocktail

Organised by



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#FFF 19 AGENDA

Why in 2019 sustainable finance is becoming more than ever the driver of the most important business choices within the financial, funds and insurance sector? Where did this green ocean tsunami originate? What is the position of the regulators at both European and national level in this matter?

These are the main questions that inspired us in the organization of this year's event.

Authorities and prominent speakers from the private sector will intervene in plenary sessions throughout the day providing first-hand insights on the latest regulatory directions.

Once the big picture framed about what we do mean for Sustainable Finance, three panels will then take place, after each plenary session, covering sustainability linked to the Luxembourg financial, funds and insurance arena.

Within each panel, you will be presented the hottest topics linked to sustainability, including measurement and governance, from a technical perspective as well as concrete examples of the most innovative solutions around the globe.

8.30-9.00



Registration and Networking Breakfast

9.00-9.10

Introduction by **Mr. Fabio Morvilli**, President, Camera di Commercio Italo-Lussemburghese
Welcome speech by **Mr. Marco Caldana**, Chairman and Founder, **FARAD Group a B-Corp**

9.10-9.30

Authority:

Mr. Claude Marx, General Director, **Commission de Surveillance du Secteur Financier**

9.30 - 9.50

Market insights:

Ms. Corinne Molitor, Director, **Innpact** - Member of the Board of Directors, **ICFA**
(International Climate Finance Accelerator) Luxembourg

*The Luxemburg Sustainable Finance roadmap. A roadmap elaborated by and for a whole sector.
Presentation of main recommendations.*

09.50-10.50

PANEL SESSION I



ASSET MANAGEMENT

ROOM C1 - The spectrum of sustainable investments: different approaches

Leader: Ms. Corinne Molitor, Director, Innpact

Speakers: Mr. Edouard d'Anterroches, Partner, AKD Luxembourg

Mr. Thierry Feltgen, Investment Communication, Banque de Luxembourg Investments

Mr. Michael P. Reilly, CFA Group Managing Director & CIO - Equities, TCW Europe

Mr. Xavier Heude, Co-Managing Director, Backbone

Mr. Diego Stapff, Director Strategy & Planning, Finance In Motion



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INSURANCE

ROOM C2 - ESG principles in an insurance context

Leader: Mr. David De Cubber, Senior Associate, Volckrick&Associates

Speakers: Ms. Valérie Mariatte-Wood, Head of Regulatory Proposition, Lombard International

Ms. Inge de Wolf, International Division Head of Legal Director, Swiss Life

Ms. Silvia Lolli, Counsel, Hogan Lovells

Mr. Jean-Baptiste Pleyne, Lead Actuary, IBISA



FUNDS

ROOM C3 - Distribution of ESG products : should the latter be disruptive (to be successful)?

Leader: Mr. Luca Bruni, Independent Consultant

Speakers: Ms. Laetitia Hamon, Senior Manager, Sustainable Finance, KPMG

Mr. Marco Lagona, Head of Fund Services, Amicorp

Mr. Mario Mantrisi, General Manager, LuxFLAG

Mr. Oliver Plein, Managing Director, Head of Investments Active Equity, DWS

Mr. Namir Yeroham, Senior Business & Relationship Development Manager, Fundsquare



11.10-11.25

Keynote speaker:**Mr. Nicolas Mackel**, CEO, **Luxembourg for Finance***Mainstreaming sustainable finance - The view from Luxembourg's financial centre*

11.30-11.50

Keynote speaker:**Mr. Paul Clements-Hunt**, CEO, **The Blended Capital Group** - Former Head **UNEP-FI**
(United Nations Environment Programme-Finance Initiative)*The United Nations, an ESG Revolution and the road to 2030.*

12.00-13.00

PANEL SESSION II**ROOM C1 - ESG - S: Social Finance. Different approaches in the industry**

Leader:

Mr. Giuseppe Fazi, Junior Portfolio Manager, FIA AM - FARAD Group

Speakers:

Mr. Gianluca Manca, Head of Sustainability, Eurizon Capital

Mr. Gareth Davies, Head of Responsible Investment Solutions, Columbia Threadneedle UK

Ms. Nichola Marshall, Head of Responsible Investment, SparInvest

Ms. Valérie Arnold, Audit Partner, Cr and Sustainability Leader, PWC

**ROOM C2 - How ESG criteria can create value in the long term, with a particular focus on governance requirements within the fund servicing sector**

Leader:

Mr. Massimoluca Mattioli, Group Head of Institutional Banking, Banque Havilland

Speakers:

Mr. Lorenzo Avico, Head of External Distribution & Instit. Sales Luxembourg, BNP Paribas AM

Mr. Walter Ricciotti, CEO, Q-Group

Mr. Nicolas Crochet, Managing Partner, Funds for Good

Mr. Marcus Peter, Partner, GSK Stockmann

Ms. Julie Castiaux, Sustainability Expert, Deloitte Luxembourg

**ROOM C3 - Is ESG on the agenda of the Board of Insurance Companies in 2019?**

Leader:

Ms. Carine Feipel, Independent Director

Speakers:

Mr. Victor Rod, Directeur Honoraire, CAA

Mr. Jacques Faveyrol, CEO Cardif Lux Vie

Ms. Maria Mateo Iborra, Founder & CEO, IBISA

Mr. Manuel Fernandez, Senior Associate, GSK Stockmann

Mr. Carlos Montalvo Rebuella, EMEA Insurance Regulatory Leader, PWC

13.00-14.15



Networking lunch

14.15-14.35

Authority:**Mr. Claude Wirion**, Président du Comité de Direction, **Commissariat aux Assurances***Le nouveau paysage de l'assurance luxembourgeoise*

14.40-15.00

Keynote speaker:**Mr. Carlos Montalvo Rebuella**, EMEA Insurance Regulatory Leader, **PWC***European Commission's Action Plan on Sustainable Finance: looking forward insurance role in promoting sustainable growth*

15.00-16.00

PANEL SESSION III



ROOM C1 -

Luxembourg Life Insurance for European investors

Leader:

Mr. Thierry Morel, Country Manager France, FIA AM - FARAD Group

Speakers:

France & Luxembourg - Mr. Laurent Gayet, Head of Business, Dev. Wealth Planning & Legal, AXA Belgium - Mr. Amaury de Potter d'Indoye, Director Sales Belgium & Luxembourg, Lombard Intl. France - Mr. Stephan Ludwig, Head of Sales French market, Vitis Life Italy - Mr. Antonio Valente, Head of Sales, CNP Luxembourg Spain & Portugal - Mr. Gonzalo Garcia Pérez, Wealth Planner Manager Iberia/Latam, Onelife Germany - Mr. Stefan Fank, Insurance Broker, FARAD International S.A.



ROOM C2 -

ESG - E: The challenges of green finance and clean energy investing

Leader:

Ms. Annemarie Arens, Independent Director

Speakers:

Mr. Fabio Mastrosimone, Managing Director, Amicorp
Mr. Stéphane Badey, Partner, Arendt Regulatory & Consulting
Ms. Martina Turner, Fund Manager, Quaero Capital
Ms. Kristel Cools, Group Head of Asset Management, KBL
Mr. Roland Rott, Head of ESG, La Française AM



ROOM C3 -

UK: has the boat already left the harbour...?

Leader:

Mr. Luca Bruni, Independent Consultant

Speakers:

Mr. Gian Luca Giurlani, Managing Director, TCW
Mr. Sohail Jaffer, Independent Director and Consultant
Ms. Carla Jane Findlay-Dons, Chief Global Regulatory and Market Strategist, BBH
Ms. Daniela Klasén-Martin, Group Head of Management Company Services, Crestbridge

16.00 - 16.20



Networking coffee break



16.20-16.40

Keynote speaker

Mr. Christian Tock, PhD, Director Sustainable Technologies, **Ministère de l'Économie**

The Circular Transition. Background, needs and opportunities

16.40-17.40

PANEL SESSION IV



ROOM C1 -

Anti Money Laundering: my sustainable KYC

Leader:

Mr. David De Cubber, Senior Associate, Volckrick&Associates

Speakers:

Mr. Max Braun, Director, Cellule de Renseignement Financier (CRF)
Ms. Carine Lecoq, CAA
Mr. Alexandre Mollard, Chief Compliance Officer MLRO, Lombard International
Ms. Sarah Khabirpour, Chief Compliance Officer, Banque de Luxembourg
Mr. Marco Zwick, Director, CSSF
Mr. Roger Hartmann, Group Strategy Leader, Fuchs Group
Mr. Bert Bouton, Dirigeant Agréé - Independent Captive Management Services, Nepenthe



ROOM C2 -

UN Sustainable development Goals: Water Security is essential to tackling climate change, protecting the bottom line

Leader:

Prof. Laurent Martière, Louvain La Neuve, Paris Dauphin

Speakers:

Mr. Thomas Schumann, Investment Advisor/Initiator, Water Security Fund
Mr. Sachin Vankalas, Director Operations & Sustainability, LuxFLAG
Mr. Tony Healy, Sales Director, FreshPonics

17.40 - 19.00



Networking Cocktail



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