

## After-Work Lectures on Asset and Investment Management

Thursday, October 13, 2011

# Future Directions in Investment Management

Institute for Financial Services

Chair of Business Administration, Banking and Financial Management



## After-Work Lectures on Asset and Investment Management

Series of lectures on current developments in Asset and Investment Management. Exchange of ideas from the professionals of Corporations, Banks, Asset Management, Investment and Insurance Companies, Financial Advisory Services, Tax Administration, Lawyers, Trustees, Fund Managers and Financial Auditors.

### Abstract

Investment management is at a crossroad. The 2008 crisis together with renewed sovereign debt concerns and deep geopolitical transformations call into question and indeed shatter a number of commonly held investment management assumptions and practices. Thought leadership is called for, to restore trust in the profession and to create real value for investors. Dr. Balocchi will examine a few key opportunities in this regard, along with structural obstacles. He will also critique risk management practices that paradoxically can lead to risk exacerbation.

### Speaker

Dr. *Giuseppe Balocchi*, CFA, is head of financial engineering and risk analytics at the Trading Division of Pictet & Cie in Geneva, Switzerland. Previously, he served as chief investment officer at Olsen Ltd. and as a fixed income manager at the Asian Development Bank in Manila, Philippines.

Dr. *Balocchi* started his career as a high-energy physicist at CERN. He is a member of CFA Institute Board of Governors, past President of the Swiss CFA Society and member of the Steering Committee of the Master of Finance at the University of Lausanne. He was a CFA exam grader and served on the Executive Advisory Board of the Education Advisory Committee of the CFA Institute, on the Annual Conference Committee and on the Board of Regents of the Financial Analysts Seminar. He holds a Laurea (MS) in Physics from the University of Bologna (Italy), an MBA from the Open University (UK) and a PhD in High Energy Physics from the University of Rochester (USA). He is the author of thirty academic publications in physics and finance, served as Adjunct Professor at the University of Genoa (Italy) and acts as referee for several academic journals.

### Panel Discussion

Feel free to submit questions in advance until Tuesday, October 11, 2011 to *Monika Züger* and *Anna-Maria Cornal*, Institute for Financial Services, T +423 265 13 48, T +423 265 13 49, [banking@uni.li](mailto:banking@uni.li).

## Program

**Thursday, October 13, 2011**

### Welcome and Introduction

05.30 Prof. Dr. *Marco Menichetti*, Chair of Business Administration, Banking and Financial Management, Institute for Financial Services, University of Liechtenstein, Vaduz

### Future Directions in Investment Management

05.45 Dr. *Giuseppe Balocchi*, CFA, Head of Financial Engineering and Risk Analytics at the Trading Division of Pictet & Cie, Banquiers, Geneva, Switzerland

### Panel Discussion

06.30 Moderation: Prof. Dr. *Marco Menichetti*

### Closing Words

06.50 *Michael Frommelt*, CFA, President of the Liechtenstein Society of Investment Professionals, Vaduz

### Apéro and Exchange of Ideas

## General Information

### Participants

Professionals of Corporations, Banks, Asset Management, Investment and Insurance Companies, Financial Advisory Services, Tax Administration, Lawyers, Trustees, Fund Managers and Financial Auditors.

### Location

University of Liechtenstein, Vaduz  
Lecture Room 1 (H1)

### Time

Thursday, October 13, 2011  
05.30-07.00 pm

### Fee

Free of charge. Advance registration required.

### Registration

For registration visit [www.uni.li](http://www.uni.li) (-> Financial Services -> Continuing Education -> Finance -> Lectures & Seminars) or fax +423 265 11 12

### Deadline for Registration

Tuesday, October 11, 2011

### Contact and Information

Prof. Dr. *Marco Menichetti*, Chair of Business Administration, Banking and Financial Management, Institute for Financial Services, University of Liechtenstein, Vaduz

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