

25th After-Work Lecture on Asset & Investment Management
Thursday, 22 May 2014

Current Challenges in Wealth Management

Dr. *Thomas Trauth*, CFA, FRM

Institute for Financial Services
Chair in 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

Private Wealth Management is a discipline with clear development needs. The industry significantly lags behind academic research. Private Wealth Management is very demanding. The development of tailored optimal Wealth Management solutions can become very complex, while at the same time it is difficult to develop economies of scale. In addition, clients often lack the know-how to fully appreciate sophisticated solutions. Since the millennium, markets encountered three major financial market crises, which highlights the need for robust absolute return strategies. On top of that, the offshore wealth management industry has to reinvent itself and faces multiple challenges, among others, increasing regulation and increasingly complex tax frameworks. The objective of the presentation is to highlight current challenges for private wealth managers and to discuss strategic options.

Speaker

Dr. Thomas Trauth (1965) is financial advisor and wealth manager. He is founder and managing partner of Blue Horizon Wealth Partner AG in Rüslikon (Zurich) a boutique wealth management firm with a focus on holistic wealth and risk management. He also acts as consultant for other asset managers in the areas of investment strategy, business development and strategy. He has sound professional experience in international financial services. He started his career at Swiss Re and held various management positions at Credit Suisse. Between 2007 and 2011 he was Chief Executive Officer as well as Chief Investment Officer of Kaiser Ritter Partner Private Bank AG, Vaduz. Dr. Trauth has extensive experience in the areas of wealth, investment, and risk management. He is a Chartered Financial Analyst (CFA) and Financial Risk Manager (FRM).

Programme

Thursday, 22 May 2014

Welcome and Introduction

05.30 p.m. Ass.-Prof. Dr. *Georg Peter*, CFA, Chair in Business Administration, Banking and Financial Management, Institute for Financial Services, University of Liechtenstein, Vaduz

Current Challenges in Wealth Management

05.40 p.m. Dr. *Thomas Trauth*, CFA, FRM, Managing Partner, Blue Horizon Wealth Partner AG, Rüşchlikon

Discussion

06.30 p.m. Chair: Ass.-Prof. Dr. *Georg Peter*, CFA

Closing Words

06.40 p.m. *Michael Frommelt*, CFA, President of the Liechtenstein Society of Investment Professionals, Vaduz

Apéro

06.45 p.m. A p é r o a n d E x c h a n g e o f I d e a s

General Information

Participants

Professionals from Corporations, Banks, Asset and Investment Management Companies, Insurance Companies, Financial Advisory Services, Tax Administration, Lawyers, Trustees, Fund Managers and Financial Auditors. Graduate and undergraduate students with interest in investments and finance.

Location

University of Liechtenstein, Vaduz
Lecture Room 1 (H1)

Time

Thursday, 22 May 2014
05.30 - 07.00 p.m.

Fee

Free of charge. Advance registration required.

Registration

For registration visit www.uni.li/awl or by fax +423 265 11 12

Deadline for Registration

Tuesday, 20 May 2014

Contact and Information

Ass.-Prof. Dr. *Georg Peter*, CFA, Chair in Business Administration, Banking and Financial Management, Institute for Financial Services, University of Liechtenstein, Vaduz

Monika Züger and *Anna-Maria Cornal*, University of Liechtenstein, Institute for Financial Services, T +423 265 13 48, banking@uni.li

Discussion:

Feel free to submit questions in advance until Tuesday, 20 May 2014 to Mrs. *Züger* or Mrs. *Cornal*, Institute for Financial Services, T +423 265 13 48, banking@uni.li.

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