



THURSDAY, 01 OCTOBER 2015



Next Generation Asset & Wealth Management – Perspectives of a FinTech Entrepreneur

- *Michael F. Appenzeller*
Managing Director, Etops AG, Pfaeffikon, Switzerland

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

Abstract

Based on over 10 years' experience in the asset and wealth management space, 6 of them as an entrepreneur and founder of two companies, Mr. Appenzeller will highlight the upcoming dramatic changes to the asset and wealth management landscape, take a thought-provoking perspective on the consequences for incumbents, highlight the risky and entrepreneurial answers that are being developed from Silicon Valley to Zurich and discuss what this could all mean for today's integrated market leaders, namely banks and wealth managers.

Speaker

Michael F. Appenzeller has extensive experience in the finance industry. He started his career as a Strategy Consultant and became a Project Manager at Oliver Wyman (former Mercer Management Consulting) in Zurich, Switzerland. He ran strategic asset management and capital market projects throughout Europe, the United Kingdom, United States and Middle East. In 2006 he joined Horizon21 Wealth Management in Pfaeffikon, Switzerland, as Business Manager and Member of the Management Committee, being responsible for strategic development and operations.

In 2010 he co-founded Etops, Switzerland's leading independent operational service provider focusing on operational outsourcing, reporting and system solutions, Compliance solutions and business projects. The company runs operations for 20 Billion of assets for some of the leading sophisticated investors in Switzerland. Michael further co-founded Fundbase in 2013. Fundbase is technology start-up in the B2B FinTech space that will radically improve and innovate the way professional investors discover, execute and operate alternative investments such as Hedge Funds.

He holds a Master's of Science in Economy from the University of St. Gallen, Switzerland, where his major courses of study were corporate finance, accounting and controlling.

CE Qualified Activity

This event is a CE Qualified Activity and earns CFA Institute members 1.0 CE credits. For further information, please refer to the back of this brochure.

Programme

Thursday, 01 October 2015

Welcome and Introduction

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

Next Generation Asset & Wealth Management, Perspectives of a FinTech Entrepreneur

05.40 p.m. *Michael F. Appenzeller*, Managing Director, Etops AG, Pfaeffikon, Switzerland

Discussion

06.30 p.m. Chair: Prof. Dr. *Marco J. Menichetti*

Closing Words

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

Apéro

06.50 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, 01 October 2015
05.30 - 07.00 p.m.

Fee

Free of charge. Advance registration required.

Registration

For registration visit www.uni.li/awl or send an e-mail to banking@uni.li.

Deadline for Registration

Tuesday, 29 September 2015

Contact and Information

Dr. *Lars Kaiser*, Assistant Professor, Chair in Business Administration, Banking and Financial Management, Institute for Financial Services, University of Liechtenstein, Vaduz.

Assistants: *Monika Züger* and *Anna-Maria Cornal*, University of Liechtenstein, Institute for Financial Services, T +423 265 13 48 / 13 49, banking@uni.li

Discussion:

Feel free to submit questions in advance until Tuesday, 29 September 2015 to Mrs. *Züger* or Mrs. *Cornal*, Institute for Financial Services, T +423 265 13 48, banking@uni.li.

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www.cfasociety.org/liechtenstein

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CFA Society Liechtenstein

The CFA Society Liechtenstein has evolved out of the long standing "Liechtenstein Society of Investment Professionals (LSIP)" and has recently become an official member society of the CFA Institute. Its origins date back to January 2006 when it was set-up by 15 founding partners and today counts over 100 members; constantly seeking for interested and dedicated new members. By becoming a recognised society of the CFA Institute, members are granted access to a variety of valuable resources and international conferences. Furthermore, the society has also got access to additional scholarships to support locals in their pursuit of becoming a CFA Charterholder.

www.cfasociety.org/liechtenstein

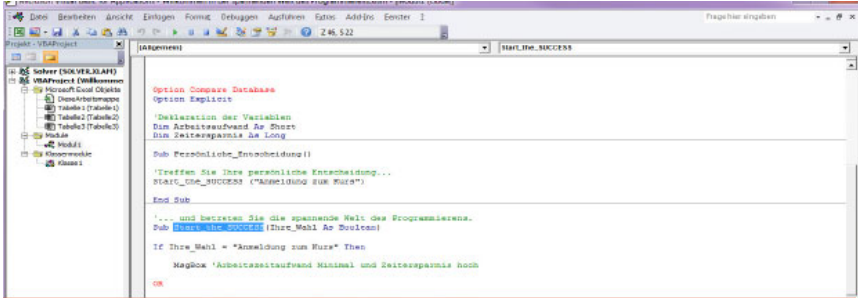
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- > Course is eligible for 10 CFA Institute CE credit hours



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 - > Bestandteile der Entwicklungsumgebung
 - > Grundregel der Syntax
- > Einführung in die Kommunikation zwischen VBA und Tabellenblättern
- > Deklaration von Variablen und vordefinierten Funktionen
- > Entwurf von Error- und Nachrichtenfenstern
- > Verwendung von Excel-Funktion im VBA-Code
- > Einführung der verschiedenen Variablentypen
- > Interpretation und Struktur der Aufzeichnung
- > Verlinkung zwischen VBA-Code und Tabellenblättern
- > Ausgabesteuerung auf verschiedenen Tabellenblättern
- > Manipulation von Grafiken

Keine Vorkenntnisse erforderlich!

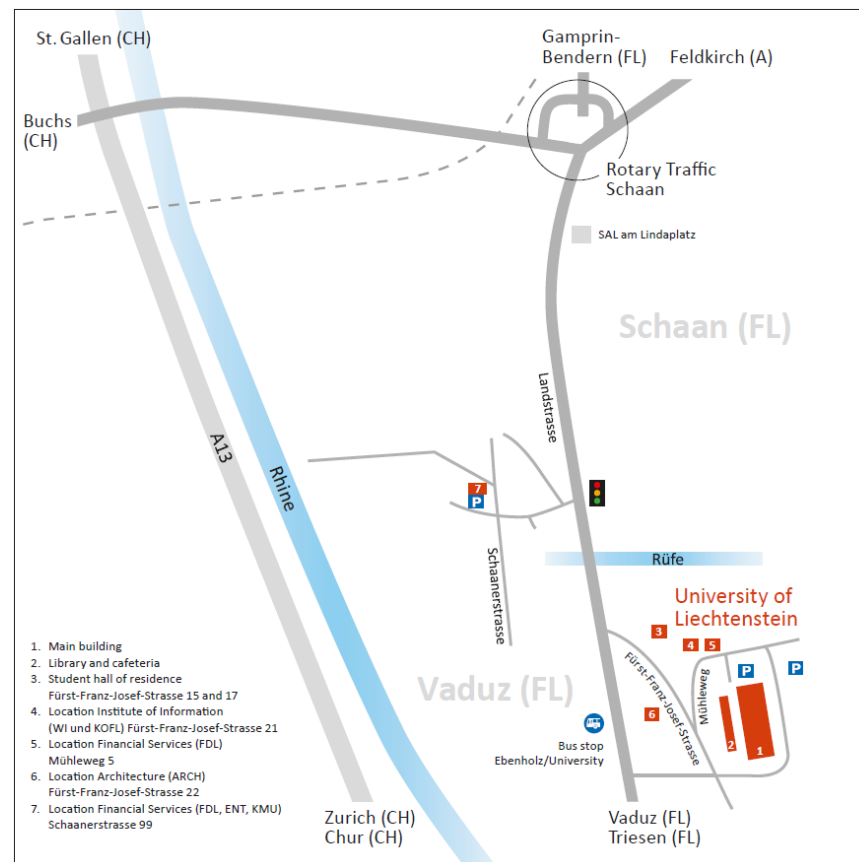
Dozent: Jurij-Andrei Reichenecker, MSc UZH ETH

Weitere Informationen und Anmeldung: www.uni.li/vba



Notes

Directions



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