

Geneva Financial Center



Observatoire de la Finance

Is Virtual Private Banking Feasible?

- Regulating E-banking
- Telecom & Banks – A New Alliance?
- Globalisation of Private Banking
- Towards a Cyberbank

Geneva Forum Private Banking,
Finance & Technology

20 – 21 September 2000
Intercontinental Hotel Geneva



ARTHURANDERSEN



i n v e n t

REUTERS 

l'agefi

LE QUOTIDIEN SUISSE DES AFFAIRES ET DE LA FINANCE

Final Programme – 27 Speakers, 15 Exhibition Stands

Information Technology: reshaping the Financial Services Industry

20 September 2000

Who should attend?

This conference is aimed at:

- Banks and asset management institutions
- Experts and advisers to such institutions
- Legal advisors and counsellors
- Technology providers (software and hardware)
- Strategy-minded top management
- Information Technology, e-commerce or e-banking directors
- Marketing directors and project managers

Why this Conference?

- To stimulate strategic thinking by giving a broad, but precise, view of the structural shake-up financial institutions are experiencing as a result of technological innovations and opportunities.
- On an operational level, to discuss how technology-driven changes affect, or will affect, specific functions of financial institutions and to provide the best possible expertise function by function, as well as an account of first-hand experiences.
- To identify the characteristics of the Private Banking business as a specific market segment in financial services and to look at how IT affects entry barriers to this industry.
- To give participants the opportunity to learn more about the changing competitive environment to which Private Banking as a business is increasingly exposed.

08.45

Registration and welcome (coffee)

09.15

*François Gilliéron – Fondation Genève Place Financière
Paul H. Dembinski – Observatoire de la Finance*

Ouverture du Geneva Forum Private Banking, Finance & Technology

09.30

*Bernard Droux – Member of the Board of SWX
First Executive Vice President, Lombard-Odier, Genève*

Introduction by the Chair

09.45

*Dr Jürgen Pulm – Head of e-commerce & Technology,
Deutsche Bank AG, Private Banking, Frankfurt*

Is Technology Driving Clients' Demands and Behaviour?

- The emerging Profile of future Customers of Financial Services
 - WAP and Demand for Financial Services
 - Remote Access vs. on-shore Expansion
-

10.15

Coffee Break

10.45

*Jeremy Penn – Executive Vice President, Strategy &
Marketing Reuterspace, Reuters, New York*

Does Internet suit tailor-made financial services?

- Limits to Customisation
 - Mass vs Niche: the strategy dilemma
-

11.15

*Jean-François Conil Lacoste – Senior Vice President,
Euronext, Paris*

L'espace virtuel menace-t-il les places boursières?

- Regroupement et alliances entre les bourses traditionnelles face aux nouveaux concurrents
 - Qualité de l'information sur le prix
 - Coût et vitesse d'exécution de la transaction
-

12.30

Lunch

Special Workshops

20 September 2000

Technology Platforms and Risks		How does IT break-up the Value Chain?	
14.00	Chair's Address <i>Prof. Daniel Mlynek – Ecole Polytechnique Fédérale de Lausanne, Lausanne</i>	14.00	Chair's Address <i>Paul H. Dembinski – Secrétaire exécutif, Observatoire de la Finance, Genève</i>
14.15	How to Assess Technology Risks? <ul style="list-style-type: none"> Inherent risks of e-business technology Learning from projects <i>Pierre Brun – Partner, PricewaterhouseCoopers, Zürich</i>	14.15	Avantages d'une plate-forme de services intégrés <ul style="list-style-type: none"> La banque privée au sein de la banque universelle <i>François Rumpf – Directeur, Banque Ferrier Lullin, Genève</i>
14.45	Standards de sécurité <ul style="list-style-type: none"> Bon et mauvais usage de cryptographie Coût de la sécurité <i>Christophe Nicolas – Head of Engineering, Kudelski S.A.</i>	14.45	Telecoms & Banks: a new Alliance? <i>Juan Asúa Madariaga – Director general de e-commerce, Banco Bilbao Vizcaya Argentaria, Madrid</i>
16.00	Handling the illusion of computer security <ul style="list-style-type: none"> The meta-sphere of computer insecurity Hackers' motives and hackers' ethics <i>Andy Muller-Maguhn – Chaos Computer Club, Berlin</i>	16.00	E-Business Networks in Industry & Financial Services <ul style="list-style-type: none"> How are e-Business networks accelerating globalization Reconfiguration of the value chain: the example of the steel industry <i>Amit Pau – President of e-Business Products, GTS, London</i>
16.30	Panel discussion	16.30	Panel discussion

Internet & Internal Organisation of Banks		Internet & Financial Marketing	
14.00	Chair's Address <i>Christophe Perritaz – Secrétariat d'Etat à l'Economie, Berne</i>	14.00	Chair's Address <i>Prof. Ghislaine Cestre – HEC, Lausanne</i>
14.15	Reorganising the Banks <ul style="list-style-type: none"> Internal transformation: a necessary step No benefit from internet without in-depth transformation <i>Richar Lowrie – Principal, e-Business, BIS financial services, IBM, London</i>	14.15	Modern Knowledge Methods of discovery <ul style="list-style-type: none"> Predict customers' behaviour Optimise web site effectiveness <i>Prof. L. Jacobs – Chief Scientist, MIT, Boston & Chief Technology Officer, KdLabs AG, Zurich</i>
14.45	Culture d'entreprise et nouvelles technologies <ul style="list-style-type: none"> Avantages et limites des nouvelles technologies D'une culture centrée sur le produit à une culture centrée sur le client <i>Yann Borgstedt – CEO, Netsys Technologies, London</i>	14.45	Conception d'un site web pour le Private Banking, challenges et défis <ul style="list-style-type: none"> Identification des facteurs clés de succès Le challenge de virtualisation de la relation Le défi de la mise en œuvre <i>Marc Besson – Business Consulting Manager, Arthur Andersen, Genève</i>
16.00	Organising Cyberspace <ul style="list-style-type: none"> Private Banking for everyone The European e- and m- differentiation process <i>Johan Larson – Head of SEB e-banking, Stockholm</i>	16.00	Banque et constructeur de site <ul style="list-style-type: none"> Dialogue entre le client et le constructeur de site <i>Thierry Chatenet – Director, Sales & Marketing, e-media, Gland</i>
16.30	Panel discussion	16.30	Panel discussion

17.00 – 18.00 **Three Special Promotional Workshops**

Arthur Andersen, Evolution of m-finance services
 Hewlett Packard, Définir une architecture software évolutive
 Reuters, e-enabling the financial industry:
 a case study in e-brokerage

Towards Virtual Private Banking?

21 September 2000

08.45

Welcome (coffee)

09.00

Michael Macdermott – Senior Manager
Financial Services, Arthur Andersen, Genève

Introduction by the Chair

09.15

Jacques de Saussure
Associé, Pictet & Cie, Genève

Le métier de base de la banque privée face au défi des technologies de l'information

- Les nouvelles valeurs ajoutées du banquier privé liées aux technologies de l'information
- Comment garder sa spécificité de banquier privé dans ce nouvel environnement?

09.45

Claudio Aguirre – Chairman International
Private Banking Europe, Merrill Lynch, London

Globalisation of Private Banking

- Can Institutional asset management compete with Private Banking?
- Is a personal relationship achievable on the Web?
- Emergence of world-wide players

10.30

Coffee Break

11.00

Andrew Hilton
Director, Centre for the Study
of Financial Innovation, London

Let's Think the Unthinkable

- Internet, a fragile flower
- Beyond the Internet euphoria

12.30

Lunch

New Players in Private Banking

Aspects réglementaires et juridiques

14.15

Introduction by the Chair

Hans Blommestein – Senior Financial Analyst, OECD, Paris

14.15

Introduction du président

Prof. Christian Bovet – Université de Genève

14.30

How can Technology enhance the competitive edge of Private Banking?

Olivier Trancart – Vice-President, Financial services industry world wide, Hewlett-Packard, Genève

14.30

Signature électronique en Suisse

- Ordonnance du Conseil fédéral du 12 avril 2000
- Responsabilités des parties et de l'autorité de certification

Michel Jaccard – Avocat, étude Tavernier Tschanz, Genève

15.00

The prospects of Bancassurance

- Bancassurance
 - Life insurance as a Private Banking service
- Prof. G. Dickinson – Director, Insurance & Investment Centre, City University, London

15.00

Fiscalité du e-commerce dans un contexte suisse et international

- Fiscalité directe
- Fiscalité indirecte (en particulier TVA)

Pierre Marie Glauser – Avocat, étude Oberson, Genève

16.00

On-line brokers and Private Banking

- Is price a sufficient advantage?
 - Competition or co-operation?
- Reto Francioni – Chief Executive Officer, ConSors Discount Brokers AG, Nuremberg

16.00

Réglementation européenne en matière de e-commerce

- Conséquences pratiques
- Perspectives réglementaires

Eric Ducoulombier – Administrateur, e-Business unit, Commission européenne, Bruxelles

16.30

Panel discussion

16.30

Panel discussion

17.00

Closure of the Forum

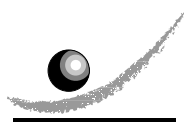


Observatoire de la Finance

www.obsfin.ch

Established as foundation under Swiss law in 1996, with offices in Geneva, the "Observatoire de la Finance" is supervised by a board which determines its overall policy and is managed by the Prof. P.H. Dembinski (executive secretary). Jean-Loup Dherse chairs the board. The "Observatoire de la Finance" has been set up to encourage new thinking, debate and proposals aimed at helping the financial sector to contribute to the common good.

The "Observatoire de la Finance" publishes a review "Finance & Bien Commun/Common Good" and runs three programmes: Finance & Technology; Finance, Ethics & Responsibility; Finance, Cultures & Religions. The programme Finance & Technology surveys the impact of the information revolution on the structures and working of the financial system. This programme organises since 1998 a series of business conferences "Global Forum on Finance & Technology" and publishes a magazine together with l'Agefi (Swiss financial daily).



Geneva Financial Center

www.geneva-finance.ch

The Geneva Financial Center Foundation works for the independence and continuity of Geneva as a financial center by promoting its development and its renown.

The Foundation, through its knowledge of Geneva's advantages, works to spread information and to strengthen the conviction that the city will untiringly pursue its efforts to provide institutional and private investors with the solutions that are adapted to their needs.

The efficient defense of the interests of Geneva as a financial center also means listening to and communicating with the public, the media and with Swiss or foreign government bodies.

The Foundation is particularly active in the following areas: *Promotional activities – Training – Communication – Regulatory issues.*



e-media



Unisys

Eri Bancaire

FirstQuote

Akodi

TKS-Teknosoft

Promco

During the two days of the conference, a large "demonstration area" will be reserved for sponsors to present their products and services. Please take a moment to visit the different booths.

The organisers reserve the right to alter the advertised programme, speakers or venue if necessary.

Administrative Details

Fees

The fee for this conference is CHF1800.00 per participant for the 2-day conference. Fees are inclusive of refreshments, lunch and documentation. Registration will be effective on receipt of full payment and a completed registration form.

How to register

By Post to: Geneva Financial Center Foundation • 10, Cours de Rive • P.O. Box 3237 • CH-1211 Geneva 3 • By Fax: + 41 22 849 56 01

Cancellation

No charge for written cancellation notified up to August 19th, 2000.

Full charge for cancellation after August 19th, 2000.

A substitute participant will be accepted at any time with written notification.

Venue

Intercontinental Hotel • 7-9, ch. du Petit Saconnex • CH-1211 Geneva 19 • Tel: + 41 22 919 39 39 • Fax: + 41 22 919 38 38

Accommodation

A block of rooms has been set aside for participants at the Intercontinental Hotel. On receipt of your conference registration form, you will be sent details of how to book directly with the hotel.

Confirmation details

Admission details will be sent on receipt of your booking form and remittance. If you have not received this information within two weeks of the conference date, please contact the Geneva Financial Center Foundation.

Programme Information

Observatoire de la Finance • 32, rue de l'Athénée • 1206 Geneva • Switzerland

Ms Nati Garcia • Tel: + 41 22 346 30 35 • Fax: + 41 22 789 14 60 • E-mail: garcia@obsfin.ch

Registration Information

Geneva Financial Center Foundation • 10, Cours de Rive • P.O.Box 3237 • 1211 Geneva 3 • Switzerland

Ms Catherine Carrera • Tel.: + 41 22 849 56 05 • Fax: + 41 22 849 56 01 • E-mail: carrera@geneva-finance.ch

Registration Form

Participants Details (One form per person – please photocopy if necessary and complete in block capitals)

Family name _____ First name _____ Title (Mr Ms Dr etc.) _____

Position _____ Company _____

Address _____ Post Code _____ City _____ Country _____

E-mail _____ Phone _____ Fax _____

First Day Workshops

My first choice is: (please select only one workshop):

Technology Platforms & Risks

How does IT break-up the Value Chain?

Internet & Internal Organisation of Banks

Internet & Financial Marketing

My second choice is: (please select only one workshop):

Technology Platforms & Risks

How does IT break-up the Value Chain?

Internet & Internal Organisation of Banks

Internet & Financial Marketing

Second Day Parallel sessions

My choice is

New players in Private Banking

Aspects réglementaires et juridiques

Methods of Payment

Cheque for CHF _____ (CHF1800.00 per delegate) made out to Geneva Financial Center Foundation

Bank transfer to Geneva Financial Center Foundation

Banque Cantonale de Genève – Account no C776.12.48 – Clearing no 788 – Swift code BCGECHGG

Giro transfer to Geneva Financial Center Foundation – Account no 17-454094-8

Please indicate the delegate and company name as reference and send a fax confirmation of your payment