Private Banking and Sustainable Investment in Emerging Economies

23 March 2007, 0830 - 1300hrs
Auditório ANBID
Av. Brigaderio Faria Lima, 2179 - 11º andar
Jardim Paulista - São Paulo

Background / Agenda / Concept
Background

Recent research shows that wealthy individuals have a growing interest in managing their wealth in accordance to the principles of sustainable development, but as yet often lack the means to do so.

Many private banks have the knowledge, products and expertise to satisfy this new line of demand, however, to date only institutional clients seem to be targeted.

In an increasingly competitive market place, where differentiation is key, and in the context of an ever more pressing sustainability agenda, it is vital for private banks to come firmly to grips with this new reality. This is especially true in emerging economies, where both HNWI (High Net Worth Individual) populations and wealth - but also competition - are growing the fastest.

In November 2006 the United Nations Environment Programme Finance Initiative (UNEP FI) convened a meeting of senior private bankers and representatives of Genève Place Financière at the UN Palais des Nations in Geneva to identify the barriers and drivers to sustainable and responsible investment in relationship banking. Building on this event’s success, its promising results and participants’ enthusiasm, UNEP FI is seeking to pursue these issues by addressing one of the fastest growing wealth management markets of the world: Brazil.

This event seeks to enable free discussion between panellists and participants and will be followed up by a number of actions directed at the private banking clientele itself. The key questions to be dealt during the event will be:

> **The Rationale:** Sustainable Investment in Private Banking - Just Charity or the Better Product?

> **The Market:** Latin American Demand for Sustainable Investment Products and the Role of Relationship Banks - to Service or to Foster?

> **Action:** Risks and Opportunities in Developing Sustainability-Solutions for Private Clientele in Emerging Economies. How to Overcome Barriers in Brazil?
Program

WELCOME COFFEE 0830hrs

WELCOME AND INTRODUCTION 0900hrs

> Opening Remarks
  Celso Scaramuzza (confirmed)
  Head, ANBID, Private Banking Commission

> Background and Aims
  Paul Clements Hunt (confirmed)
  Head, UNEP FI

> Sustainable Finance in Latin America
  Christopher Wells (confirmed)
  Environmental Risk Manager for Latin America
  ABN Amro Banco Real;
  Chair, UNEP FI
  Latin American Task Force

SUSTAINABLE INVESTMENT? 0930hrs

> Sustainable Investment as a New Class of Asset
  Luiz Maia (confirmed)
  Director – Investment Management
  Rio Bravo Investimentos

> The Institutional Drive of ESG*-Inclusion. ESG versus Performance?
  Xavier Desmadryl (confirmed)
  Global Head of SRI Research
  HSBC Investments;
  Co-Chair, UNEP FI
  Asset Management Working Group

* Environmental, Social and Governance (Issues)
PANEL DISCUSSION 1000hrs

Sustainable Investment and Private Banking in Emerging Economies: The Rationale – The Market - Action

> **Moderator**
  Leo Johnson *(confirmed)*
  Director
  Sustainable Finance Ltd

> **Foreword**
  Sylvia Brasil Coutinho *(confirmed)*
  Executive Director
  HSBC Bank Brasil S.A.
  Asset Management,
  International & Domestic Custody
  Private Bank Latin America

Pedro Bastos *(confirmed)*
CEO
HSBC Investments Brazil

COFFEE BREAK 1115hrs

OPEN DISCUSSION 1145hrs

> Sustainable Investment in Private Banking: Just Charity or the Better Product?
> Latin American Demand for Sustainable Investment Products and the Role of Relationship Banks: to Service or to Foster?
> Risks and Opportunities in Developing Sustainability-Solutions for Private Clientele in Emerging Economies. How to Overcome Barriers in Brazil?

SUMMARY AND CLOSING REMARKS 1245hrs

> Résumé of the Main Points
> Closing Remarks
**Concept Description**

- **Event Type**: Presentation & Open Discussion.
- **Audience**: Expert group of senior private banking partners, asset managers, strategists, and responsible investment experts.
- **Numbers & Access**: 60-70 persons. On Invitation Only.
- **Organiser**: UNEP Finance Initiative / ANBID
- **Host / Venue**: ANBID
- **Date**: 23 March 2007
- **Time**: 0830 – 1300 hrs
- **Language**: English
- **Materials**: Participant Handouts (*Report: “Unlocking Value: the scope for environmental, social and governance issues in private banking”*).
- **Follow Up**: Further steps may include in-house awareness-raising sessions catered to selected client groups.
Upcoming UNEP FI Global Roundtable 2007
Melbourne, Australia, 24-25 October

For more information visit:
www.unepfi.org/melbourne