

# GLOBAL IMPACT INVESTMENT STRATEGY

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors  
 Conference – May 15<sup>th</sup> & 16<sup>th</sup>, 2019 – Mövenpick Hotel - Geneva



## Turning Narrative into Action and Reality

Geneva, March 27<sup>th</sup>, 2019

Dear Friends,

This year's conference is turning expression of hope and narrative into **thematic actions and reality** through a carefully **selected expert** panel who will share their **experience and expertise** on how they **interact concretely with SDG's**.

We have taken both a **bottom-up and a top-down** approach to detail the **strategic and practical tools** to design **pragmatic global impact investment strategies** taking into consideration **both the investee and investor's** perspective.

- ✓ **Which model is most effective** and most likely to appeal to **family offices and institutional investors**?
- ✓ How can we **take into account externalities** when profiling an impact investment?
- ✓ How **corporates best capture and report SDG commitments** and ESG contribution to **investors**?
- ✓ How to design a **tax and regulatory framework** to strengthen the **impact ecosystem structure** and at what level?
- ✓ The UN is supporting the signature of a **high sea treaty** pre-requisit to SDG 14 to ensure the **protection of the wild wet west**
- ✓ **What are the best investment opportunities in the Blue Economy**?
- ✓ The UN are also engaging with **family offices** through UNSIF to support them to **enhance their ESG, impact, and SDG strategies and projects**.
- ✓ A selection of **top-notch impact investment projects aligning with SDGs** will also illustrate **impact investing in action**.

Join our high profile participants, speakers and partners in Geneva next May 16th, 2019 and **participate to the interactive debates**

**François Golbery, Chairman, ESAFON**

To know more about ESAFON, visit our web site: <http://www.esafon.com>

STRATEGIC PARTNERS	PARTNERS		Organised by:
			<b>EVENT PARTNERS</b>
<b>MEDIA PARTNER</b>			

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### Highlights

Conference, May 16<sup>th</sup>, 2019

- Which impact investment model is most effective and most likely to appeal to family offices and institutional investors?
- How can we take into account externalities when profiling an impact investment ?
- How to design a tax and regulatory framework to strengthen the impact ecosystem structure and at what level?
- What are the best investment opportunities in the Blue Economy?
- A selection of top-notch impact investment projects aligning with SDGs
- The dual role of technology and communities to support SDG's – Exemple SDG 6, 14 & 15
- How family offices enhance their ESG, impact, and SDG strategies and projects; the support of UNSIF
- How corporates capture and report SDG commitments and ESG contribution to investors?

### About ESAFON

ESAFON is an independent **non-profit Swiss Association** created 17 years by two partners **Anne & François Golbery** with the sole objective to drive the impact agenda forward and **encourage private and public investors** to use **impact investment** to **enhance financial and social returns, better manage risks** taking into account **externalities** and **engage** stakeholders within the impact ecosystem while preserving the interests of investees.

ESAFON has launched a **Swiss Impact Initiative** with the objective to **gather expertise to scale impact globally from Switzerland**.

This implies to transform the **Swiss Impact Investment Ecosystem** including private banking, philanthropic foundations, family offices as well as pension funds and life insurance/re-insurance to drive **economies of scale and collaboration amongst investors, intermediaries and investees**.

ESAFON is a Member of the **World Alliance for Efficient Solutions** set-up by the **Solar Impulse Foundation** sourcing **1000 investible solutions** to bridge the gap between economy and ecology and **fast-track clean global economic growth**.

### About the Sustainable Development Goals

The Sustainable Development Goals are the blueprint to achieve a better and more sustainable future for all. They address the global challenges we face, including those related to **poverty, inequality, climate, environmental degradation, prosperity, peace and justice**. The Goals interconnect and in order to leave no one behind, it is important that we achieve each Goal and target by 2030.

Click on the link to learn more about each specific Goal:

<https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

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### SWISS IMPACT INVESTMENT INITIATIVE TO SCALE IMPACT GLOBALLY

#### 4<sup>th</sup> Impact Workshop Meeting

Through the Impulse of ESAFON & Swiss Impact Leaders.  
Limited Number of Swiss Impact Leading Experts will discuss how to scale impact on a global basis

May 15<sup>th</sup> 2019, 4.00 pm – 5.30 pm  
Mövenpick Hotel, 1st Floor

#### Pre-Conference Opening Cocktail

May 15<sup>th</sup> 2019, 6.00 pm - 7.00 pm  
Mövenpick Hotel, 1st Floor, Lobby

## Agenda

Conference, May 16<sup>th</sup>, 2019

8.00 am-8.30 am: Registration & Welcome Coffee

8.30 am-8.50 am: Opening Remarks by the Conference Chairman and François Golbery,  
Chairman, ESAFON

8.50 am-9.00 am: Keynote Address: Turning SDG's into Thematic Impact Investment &  
Management

**Haoliang Xu**, UN Assistant Secretary General, Assistant Administrator & Regional Director for Asia and the  
Pacific, **UNDP** (*to be confirmed*)

### REGULATIONS AND TAX

9.00 am-9.30 am: The Imperative of Impact Investing & Policy Issues to Consider

**Karen Wilson**, Head Social Impact Investing, **OECD**, Paris

9.30 am-10.00 am: Achieving SDG's through Ex Tax Projects: Case-studies

**Femke Groothuis**, Wavemaker, **EX TAX**, The Netherlands

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### IMPACT INVESTMENT MODELS

**10.00 am-10.30 am: It is time for a New Finance Paradigm in Development**

- SDG 6 Equity-driven Outcome Model that Places Social Stakeholders at the centre of Impact Investing

**Arthur Wood**, Co-founder, **Total Impact Capital**, Geneva, Switzerland



**10.30 am -11.00 am: Coffee-Break & Networking Opportunities hosted by**

**11.00 pm-12.00 pm: Impact Investment Model Panel Session**

- Which impact investment model is most effective and most likely to appeal to family offices and institutional investors?
- Is there a better model than others?
- Relevance of KPI & measurement – is there a better way?
- Low cost ways to structure, develop, bundle and securitize small impact investment

**Moderator:**

**Klaus-Michael Christensen**, CEO, **Swiss Impact Investment Association**, Zug

**Panellists:**

**Yvonne Bakkum**, Managing Director, **FMO Investment Management**, **The Hague, Netherland** (direct & indirect)

**Arthur Wood**, Co-founder, **Total Impact Capital**, **Geneva, Switzerland** (investee centric model)

**Sophie Faujour**, France Country Representative, **EVPA, France** (venture philanthropy)

**Audrey Selian**, Head of Family Office, **Rianta Capital**, **Switzerland** (direct/platform)

**Claude Amstutz**, Senior Advisor Sustainable Finance, **WWF, Switzerland** (institutional)

**Xavier Pierluca**, Founding Member & Managing Partner, **Social Investment Managers & Advisors**, **Geneva** (FO)

**Antje Biber**, CEO, **FERI, Switzerland** (to be confirmed)

### OCEAN SESSION

**12.00 pm -13.00 pm: Blue Economy Investment Panel Session**

**Introductory by the Moderator:**

**D. Michael Adams**, President, **Ocean Assets Institute**, **Geneva, London**

**A Strategic Overview of Sustainable Blue Economy Investment**

- Investments: **Public & Private Equity, Blue Bonds**
- Impacts: **Metrics, Blue Finance Principles, Climate-Pollution-Food**

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### Blue Economy Investment Panel:

- **Green Shipping & Ports**
  - **Investments:** Low Sulphur Fuels, Zero Emission power, Marine digital, Pollution control. Cruise vs Cargo sectors. Green Ports (clean onshore power, waste management & recycling, China factor)
  - **Impacts:** Climate, Green logistics, Coastal life, Resilience, Tourism
  
- **Sustainable Seafood:**
  - **Investments:** Aquaculture & Fishing, Agri-Tech
  - **Impacts:** Low-carbon protein, Over-fishing, Illegal fishing, Communities
  
- **Marine Conservation:**
  - **Investments:** Fisheries, Reefs, Mangroves, Seagrass, Coastal
  - **Impacts:** Food, Livelihoods, Carbon sequestration, Coastal resilience
  
- **Q&A:**

Investment funds & companies will be presented briefly as case studies to illustrate opportunities for financial & impact returns on a global basis.

### Panellists to be confirmed

**1.00 pm – 1.30 pm: Buffet Lunch**

#### Keynote Address:

**The Leading Role of Geneva in Fostering Collaboration amongst Sustainable Financial Places**

**Nicholas C. Niggli**, Deputy Secretary General, Department of Economic Development (DED) , **Republic and State of Geneva, Switzerland**

**1.30 pm – 1.45 pm Investing in the Blue Economy Through an Holistic Approach: Building a European Ocean Impact Investment Ecosystem**

**Antonella Calvia-Götz**, Strategic Advisor, **BEI, Luxembourg**

**1.45 pm – 2.00 pm: Marine Conservation through Investible Solutions for Sustainable Fishing**

**Dale Galvin**, Head of Impact, **RARE, USA**

**2.00 pm – 2.15 pm: The EPFL Transnational Red Sea project: Fundraising strategy and investment project**

**Anders Meibom**, Professor, Laboratory for Biological Geochemistry, **Ecole Polytechnique Fédérale de Lausanne (EPFL)& Institute of Earth Sciences, University of Lausanne.**

**Olivier Küttel**, Head of International Affairs, **EPFL, Lausanne**

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2.15 pm – 2.30 pm: Nutrition as a New Investment Theme

Greg S. Garrett, Director, Gain, Geneva

### LIVE PITCH SESSION

2.30 pm-3.15 pm: **Live Pitch Session**

Impact Investing in Action: A selection of top-notch impact investment projects aligning with SDGs

- **Environmental and Social Impact at Scale across Several UN SDGs through Re-forestration in Sub Saharan Africa**  
Shauna Matkovich, Senior Sustainability Manager, IWC Investment Partners A/S,  
International Woodland Company Group, Denmark
- **Investing in Social Housing in Ireland**  
Housing Together, Dublin (to be confirmed)

Other pitch to be confirmed

3.15 pm-3.30 pm: Coffee Break & Networking Opportunities, hosted by



### ENGAGING IMPACT STRATEGIES FOR FAMILY OFFICES

3.30 pm-4.00 pm: UNSIF Strategy for Partnering with Family Offices to Enhance their Impact Engagement

Kurt Morriesen, Senior Advisor, UNSIF, London

4.00 pm – 4.30 pm: How a Family Business Integrate and Conduct an Impact Strategy in the Course of the Day to Day Business.

Gloria Fluxa Thienemann, Vice-Chairman & CSO, Iberostar Group, Spain

4.30 pm-5.00 pm Inter-connecting Impact Family Office Investments amongst Europe & China

Florian von Tucher, Head of FO & CEO, Tucher Group, Munich, Founder & Chairman of Pan-European Technology Chamber EUTECC, a registered non-profit association focused on helping EU technology companies to enter emerging markets.

&

Chinese Entrepreneurs and Large Family Offices involved in Global Impact Investments , members of China Alliance of Social Value Investment CASVI (to be confirmed)

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### **ALIGNING PORTFOLIOS WITH ESG & SDG**

**5.00 pm-5.15 pm: Creating a Methodology for Investing in a Portfolio of Socially Responsible Assets**

**Alfred R. Berkeley**, Chairman, **Princeton Capital Management LLC, USA**, former President  
NASDAQ Stock Market

**5.15 pm-5.30 pm: Building the Bloomberg of Sustainability and Impact Investment Data**

**Mounir Sada**, Head of Innovation Business Service Switzerland, International Institutions, **SAP, Lausanne**

**5.30 pm-5.45 pm: Practical Implementation of Fair Pay**

**Henrike von Platen**, CEO / Founder, **FPI, The Fair Pay Innovation Lab**

**5.45 pm-6.30 pm: Corporate Sustainability & SDG Commitment Panel Session**

**Methodology & Tools for Evaluating and Communicating on SDG Commitment and ESG Performance: The investee and investor's perspective**

**Moderator:**

**Karl H Richter**, Executive Director, **Engagedx, Germany**

**Panellists:**

**Jean Laville**, Deputy CEO, **Swiss Sustainable Finance**

**Daniel Rufenacht**, Group Vice President, Corporate Communications & Sustainability, **SGS**

**Sandra Latner**, Corporate Responsibility and Sustainable Development Senior Specialist, **CARGILL**

**Bastien Girod**, Senior Business Developer DACH, **South Pole Group, Switzerland**

**Marian Fernando**, Public Affairs, **Nestlé S.A., Vevey**

**Mounir Sada**, Head of Innovation Business Service Switzerland, International Institutions, **SAP, Lausanne**

**6.30 pm – 6.40 pm Closing Remarks by the Chairman**

**6.40 pm – 7.30 pm Closing Cocktail**

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### Who Should Attend

- Institutional Investors including Asset Managers, Insurers, Re-insurers, Pension Funds
- Large scale Family Offices, Private Investors, Multi Family Offices, Strategic Advisors
- Endowments and Foundations
- Asset & Fund Managers, Lawyers, Administrators and Service Providers
- Real Estate Fund Managers, Real Asset Managers, Private Equity Fund GP's and LP's
- VC, Start Ups, Social Entrepreneurs, Investees, Next Gen
- Global Heads of Fund Development
- Corporate Public Affairs, Governance, Communications & Sustainability
- Private Banks and Wealth Managers willing to set-up and implement impact investment fund vehicles

### The 3<sup>rd</sup> Annual Global Impact Investment Strategy - April 19<sup>th</sup> 2018 – Geneva Feedback from the Delegates

Thanks for hosting an amazing event with great speakers and participants, we enjoyed being there and presenting our work in affordable housing in India.

*Kirti Timmanagoudar, Managing Partner | Brick Eagle Funds*

Thank you very much for the excellent conference last week- very well organised, immensely useful

*Raj Rana, Director, the Wolfgroup*

Congratulations on the successful completion of the conference!

*Angela Bai, General Secretary, China Alliance of Social Value Investment*

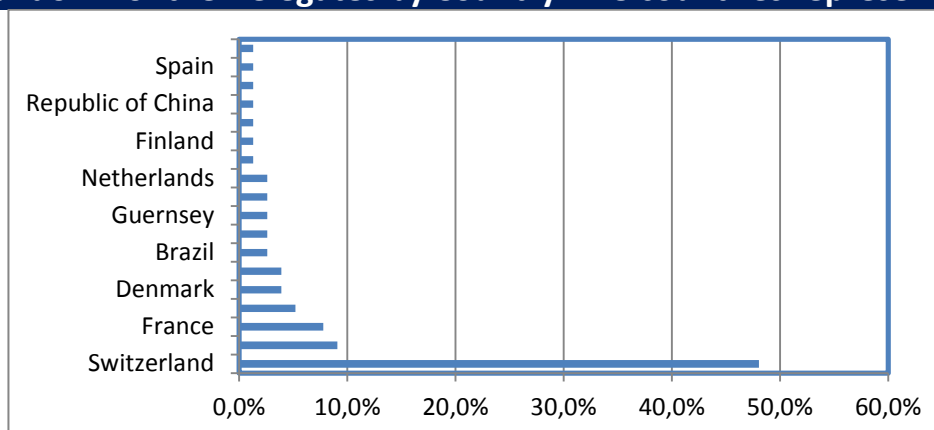
Thank you for allowing me to moderate such a high caliber panel !

*Klaus M. Christensen, President, Swiss Impact Investment Association*

Many thanks for hosting a wonderful conference and very interesting conversation.

*Karl H Richter, Head of Research and Knowledge, UNDP SDG Impact Finance (UNSIF)*

### The 3<sup>rd</sup> Annual Global Impact Investment Strategy - April 19<sup>th</sup> 2018 – Geneva Breakdown of the Delegates by Country – 18 countries represented





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## PARTNERS

	<p>The <b>United Nations Development Programme</b> is the United Nations' global development network. Headquartered in New York City, <b>UNDP</b> advocates for change and connects countries to knowledge, experience and resources to help people build a better life.</p> <p>The <b>UNSIF Research Council (RC)</b> is a collaboration between UNDP SDG Impact Finance (UNSIF) and leading global universities or academic research institutions recognized for their research in advanced financial and economic models. The RC is committed to sharing information and ideas to collaborate on a long-term research agenda in the area of new quantitative frameworks for impact investment finance and their intended effect on the achievement of the Sustainable Development Goals (SDGs).</p> <p>The objective is to undertake academically rigorous peer-reviewed research to improve the analytical frameworks, evidence, and policy environment that will incentivize and guide commercial capital to flow intentionally in support of the UN's Sustainable Development Goals.</p>
	<p>Metropolis among the most dynamic in Europe, Geneva adopts for the first time an economic strategy. The State Council creates a framework where to place the future actions of the government. This text gives directions to cantonal policy on economy by specifying the major strategic focuses and objectives.</p> <p style="text-align: center;"><b>Geneva Economic Strategy 2030</b>  <b>Vision, strategic priorities and objectives</b>  <b>Inventory and analysis of key sectors of the Geneva economy</b></p> <p>The Department for Economic Development, Research and Innovation at the Republic and State of Geneva is at the crossroad between macro-strategic thinking and micro-economic delivery to strengthen Geneva's economic ecosystem to position it to benefit from the opportunities of the digital age but also of the emergence of sustainable development economics.</p>
	<p><b>GAIN – The Global Alliance for Improved Nutrition (<a href="http://www.gainhealth.org">www.gainhealth.org</a>)</b></p> <p>The Global Alliance for Improved Nutrition (GAIN) was launched at the UN in 2002 to tackle the human suffering caused by malnutrition. Working with partners, GAIN aims at making healthier food choices more affordable, more available, and more desirable. We aim to support and advise governments, businesses, and development partners as they build and mobilise food and nutrition plans to advance nutrition outcomes. GAIN's purpose is to improve nutrition outcomes by improving the consumption of nutritious and safe food for all people, especially the most vulnerable.</p>
	<p><b>IWC Investment Partners A/S (<a href="http://www.iwcip.dk">www.iwcip.dk</a>)</b> is part of the International Woodland Company (IWC) Group, one of Europe's largest timberland investment advisors and managers, overseeing over USD 4bn in sustainable timberland investments worldwide on behalf of private institutional investors since 1991. The IWC Group provides investors with a variety of natural resources investment solutions across timberland, agriculture and impact.</p>
	<p><b>SAP</b> is NASDAQ listed tech leader and Germany's largest market capitalisation</p> <ul style="list-style-type: none"> <li>- The SAP board is very involved in championing progress on SDG program</li> <li>- Market capitalization: 135 B\$ (2017)</li> <li>- Revenues: 23.5 B€ (2017)</li> <li>- Number of employees: 88.543 (2017)</li> </ul> <p><b>SDG Global Dashboard, a Co-Innovation Program</b> driven by UNDP and SAP</p> <ul style="list-style-type: none"> <li>- SDG17 – This is a partnership for the goals. A partnership with SAP and UNDP</li> <li>- Help corporations build SDG dashboards and automate reporting processes</li> <li>- Improve measurement of Private Sector's progress on their own SDG program</li> <li>- Establish a common global platform for impact reporting</li> </ul>

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 	<p><b>Tech4Impact</b> is EPFL's sustainable impact initiative under the wings of the Vice Presidency for Innovation and a key instrument for enhancing the University's sustainable impact. As one of the worldwide leading technical universities and a key player for disruptive innovation in Switzerland and beyond, EPFL is uniquely positioned to realize innovative and entrepreneurial solutions that have the potential to achieve sustainable impact.</p>
	<p><b>The European Venture Philanthropy Association EVPA</b> (<a href="https://evpa.eu.com">https://evpa.eu.com</a>) helps investors and grantmakers connect and learn from each other in their pursuit of deeper societal impact.</p> <p><b>EVPA</b> is a lively network of organisations that create positive societal impact through venture philanthropy and social investment. EVPA has over 240 members showing the sector is rapidly evolving across borders, covering a <b>full range of venture philanthropy and social investment activities</b> including venture philanthropy funds, social investors, grant-making foundations, impact investing funds, private equity firms, professional service firms, philanthropy advisers, banks and business schools.</p> <p><b>EVPA</b> defines <b>venture philanthropy</b> as an approach to building stronger investee organisations with a societal purpose, by providing them with both financial and non-financial support.</p> <p>Venture philanthropy's ultimate objective is to <b>achieve societal impact</b>. VP does this through both <b>social investment</b> and <b>high-engagement grantmaking</b>.</p>
	<p><b>The Swiss Impact Investment Association SIIA</b> (<a href="http://www.sii.ch">www.sii.ch</a>) is a non-profit association in Zug with a mission to showcase investments and companies with societal impact.</p> <p>SIIA is a platform for best practice impact investments.</p> <p>SIIA seeks credible risk, return and impact investment opportunities to showcase. SIIA encourages all stakeholders to jointly develop a narrative for impact investment for society to adopt.</p> <p>SIIA envisions a society in which the quest for economic profit solves rather than creates social and environmental pressure.</p>
	<p><b>Swiss Sustainable Finance (SSF)</b> (<a href="http://www.sustainablefinance.ch">www.sustainablefinance.ch</a>) strengthens the position of Switzerland in the global marketplace for sustainable finance by informing, educating and catalyzing growth.</p> <p>The association, founded in 2014, has representation in Zurich, Geneva and Lugano. Currently SSF unites over 110 members and network partners from financial service providers, investors, universities and business schools, public sector entities and other interested organisations.</p>
	<p><b>South Pole</b> (<a href="http://www.southpole.com">www.southpole.com</a>)</p> <p>A pioneer in the field of climate impact assessment on investments and a world-leading advisor on sustainability-related portfolio risks, <b>South Pole</b> helps asset owners and asset managers gain actionable insights on the climate impact of their assets.</p> <p>The Group's diverse emission reduction portfolio includes many projects that ensure financial inclusion of the local communities involved.</p>
	<p><b>Celebrating 25 years  Join us at Impact Days  April 2 &amp; 3 2019  De Horst Estate, Driebergen, The Netherlands</b></p> <p>To find out more about Impact Days <a href="#">click here</a></p>
	<p><b>Sustainable Investor Summit DACH   Impact &amp; ESG   April 4 2019   Frankfurt</b></p> <p><a href="https://www.sustainableinvestorsummit.com">https://www.sustainableinvestorsummit.com</a></p> <p>Helping catalyse the German <b>sustainable investment</b> market. This leading gathering connects <b>investors</b> with the world's top ESG and impact managers</p>

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### ESAFON Partnership Opportunities 2019

Should you like to enhance your brand and promote your impact expertise, products and services to high profile Single Family Offices, Impact Private & Institutional Investors and Impact Fund & Asset Managers, don't hesitate to benefit from the ESAFON Partnership Opportunities now available for the 4<sup>th</sup> Annual Global Impact Investing Conference, May 15<sup>th</sup> & 16<sup>th</sup>, 2019, Geneva.

If interested, please contact Dr Anne Golbery, Senior Managing Director, ESAFON, [a.golbery@esafon.com](mailto:a.golbery@esafon.com), mobile 00 33 6 45 83 67 67

#### “EXHIBITOR PARTNER”: 1'950 CHF

- partner logo inserted in the conference brochure
- an exhibition space in the conference foyer for the duration of the conference to set-up your booth
- a personalised invitation to send to your contacts with a 50% discount for your contacts
- your Corporate Profile inserted on our web site with a link to your web site
- 3 complimentary conference invitations for your colleagues or clients (value: 1'800 CHF)
- the complete mailing list of the conference participants

#### “FIRST CLASS PARTNER”: 2'950 CHF

- a 30 minute non-commercial presentation as a speaker
- a personalised invitation to send to your contacts with a 50% discount for your contacts
- your Corporate Profile distributed to the participants
- 4 complimentary conference invitations for your colleagues or clients (value: 2'400 CHF)
- the complete mailing list of the conference participants

#### “SILVER PARTNER”: 4'950 CHF

- partner logo on front page of the conference brochure
- a 30 minute presentation as a guest speaker with a formal introduction from the chairman
- lunch or cocktail hosted by your organisation (luncheon costs included in the package of 4'950 CHF)
- partner's logo appears on the schedule in participant folders
- your Corporate Profile published on our web site and distributed during the conference
- a personalised invitation to send to your contacts with a 50% discount for your contacts
- 5 complimentary conference invitations for your colleagues or clients (value: 3'000 CHF)
- the complete mailing list of the conference participants

#### “GOLD PARTNER”: 6'950 CHF

- all the conditions applying to EXHIBITOR partnership, plus:
- partner logo on front page of the conference brochure
- lunch or cocktail hosted by your organisation (lunch included in the total package of 6'950 CHF)
- a 30 minute presentation as a guest speaker with a formal introduction from the chairman
- 10 complimentary conference invitations for your colleagues or clients (value: 6'000 CHF)

#### “LEAD PARTNER”: 7'950 CHF

- all the conditions applying to GOLD partnership, plus exclusivity of partnership to company's market sector

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### ESAFON Board Members



**François Golbery, Chairman, ESAFON, Switzerland** [fgolbery@esafon.com](mailto:fgolbery@esafon.com)

François Golbery is the Chairman of ESAFON, a not – for - profit independent association registered in the Registrar of the Federal Office in Bern with the objective of promoting and facilitating best practices within the Finance industry. At ESAFON, we are committed to help drive the impact agenda forward as we firmly believe that environmental and social unbalances - well described under the UN SDG's - need urgently to be addressed strategically and financially.

François strongly supports the development of a mainstream global impact capital market driven by investor's willingness and preference to achieve alongside financial returns, environmental and social returns as well.

Through ESAFON and its high profile expert network, Family Offices, strong drivers of Impact Investing, will learn how to develop the strategic and practical tools to master the hard compiling process to due diligence and risk assessment.

François is a Senior Managing Partner at MGFF Ltd, a global strategic advisor to Institutional & Private Investors involved in impact and sustainable investments.

Latest assignments include strategic advisory services to international timberland manager in fund set-up and profiling.

François has built –up a personal network of high calibre experts that are instrumental to forge the future during its tenure at MGI.

In 1988, he started-up and grew the French subsidiary of IIR, a US leading conference business organization in Paris as the most profitable entity of the group and was elected Manager of the Year in 1992 & 1993. He received his prize from Edward de Bono, the originator of the lateral thinking concept. Took over the overall responsibility of the Portuguese office and consequently had a team of 150 people under his responsibility.

He holds an MBA in Finance from the University of Hartford (Connecticut), under the patronage of Michel Barnier, former Commissioner of the Internal Market Division of the European Commission and now in charge of negotiating the Brexit for the EU.

François Golbery is a member of the Royal Ocean Racing Club in London.

François is co-owner and an active manager in forestry assets.

**Dr Anne Walhain Golbery, Senior Managing Director, ESAFON, Switzerland**  
[a.golbery@esafon.com](mailto:a.golbery@esafon.com)



Dr Anne Walhain Golbery is Managing Director and Board Member of ESAFON, a non-profit independent association started in 2001.

ESAFON new objectives from 2015 are to help family offices, private and institutional investors increase access, scalability and effectiveness of their Global Impact Investments.

Anne is Managing Partner of MGFF Ltd, a global impact investment advisor helping managers structure impact investments.

François & Anne are Partners in life and in business; Anne has been the co-founder of MGI Management Global Information SA, managing the global operations of MGI for 18 years. Previously, as IT Program Manager, Anne has been designing and implementing Technical Information Systems for the Space Electronic Equipments at EADS, France, for 12 years, from 1982 to 1994.

Anne held a Doctorate in Atomic Physics, University of Caen, France, 1979.

She enjoys doing business and sailing with François for 32 years. She has been racing as navigator on a One Ton sailing boat during the Fastnet Race 1979.

Anne is co-owner and manager in forestry assets.

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### ESAFON 2019



If you are an Asset Manager, a Fund Manager, the Head of a Family Office or a Strategic Advisor, join

### ESAFON – The European & Swiss Network of Asset and Fund Managers, Family Offices and Strategic Advisors

ESAFON is a Swiss registered non-profit association located in Switzerland that includes **family offices, institutional investors and best in class experts** addressing **global strategic impact investment issues**.

With 100 honorary members, the primary objective for ESAFON in 2019 is to help **family offices and institutional investors** increase **access, scalability and effectiveness** of their **Global Impact Investments**.

Thanks to **ESAFON** and its high profile expert network, **Family Offices, strong drivers of Impact Investing**, will learn **how to develop the strategic and practical tools to master the hard compiling process to due diligence and risk assessment**.

ESAFON members network with major international leaders through think tank meeting, workshop and social events.

[Click here to know more about UNDP-ESAFON MEETING](#)

### The 4<sup>th</sup> Annual Global Impact Investing Conference, May 15<sup>th</sup> & 16<sup>th</sup>, 2019, Geneva

ESAFON has launched **The Swiss Impact Investment Initiative S3I** with the objective to gather **expertise to scale impact globally** from Switzerland.

This implies to transform the **Swiss Impact Investment Ecosystem** including **private banking, philanthropic foundations, family offices as well as pension funds and life insurance/re-insurance, NGO, Academia, & Government** to drive **economies of scale and collaboration amongst investors, intermediaries and investees** around **Global Impact Investment Projects** with a dual approach **bottom-up and top-down** centered on the interests of investees.

ESAFON is a Member of the **World Alliance for Efficient Solutions** set-up by the **Solar Impulse Foundation** sourcing **1000 investible solutions** to bridge the gap between economy and ecology and **fast-track clean global economic growth**.

**ESAFON is launching two surveys [The European Family Office Global Impact Investments Survey 2019](#) and [The European Institutional & Pension Fund Impact Investments Survey 2019](#).**

Please ask our customer service at [customer.service@esafon.com](mailto:customer.service@esafon.com) to receive your questionnaire.

ESAFON members will furthermore have access to the **GLOBAL IMPACT FAMILY OFFICE CO-INVESTMENT PLATFORM 2019** through the **ESAFON** website: [www.esafon.com](http://www.esafon.com)

- Their details are added to the **ESAFON DIRECTORY** which is updated on a monthly basis.
- They benefit from **one personal complimentary invitation to the ESAFON conference 2019** and from a **50% discount** on their registration fee to the **ESAFON seminars 2019**
- The Annual **Individual Membership Fee 2019** is **300 CHF**.
- The Annual **Institutional Membership Fee 2019** is **600 CHF**. It allows each Institution, Member of ESAFON, to register until **3 executives** as **ESAFON Members**
- **ESAFON Honorary Membership**: this membership is restricted to the Donors willing to support the Association **ESAFON** for one year: **from 1'000 CHF**. The **ESAFON Honorary Members 2019** become **Strategic Partners of the 4<sup>th</sup> Annual Global Impact Investing conference, May 15<sup>th</sup> & 16<sup>th</sup> 2019**.

For more information concerning **ESAFON Membership** and to register, please contact:  
Dr Anne Golbery, Senior Managing Director, **ESAFON**, [a.golbery@esafon.com](mailto:a.golbery@esafon.com), + 33 6 45 83 67 67

# GLOBAL IMPACT INVESTMENT STRATEGY

Strategic & Practical Tools for Asset Owners, Family Offices & Institutional Investors  
 Conference – May 15<sup>th</sup> & 16<sup>th</sup>, 2019 – Mövenpick Hotel - Geneva

## How to Register

Please send back this Form fulfilled and signed to our Customer Service at [customer.service@esafon.com](mailto:customer.service@esafon.com)

**CONFERENCE: (cpe: 8 hours)** **27.03.2019**

**Title: GLOBAL IMPACT INVESTMENT STRATEGY**

**Date:** May 15<sup>th</sup> & 16<sup>th</sup>, 2019

**Conference Code:** C1920

**Conference Venue:** Mövenpick Hotel, Geneva  
[www.movenpick.com](http://www.movenpick.com)  
*This 5\* Business Hotel is very closed to the Airport and has a free shuttle available every 20 min for its clients*

**REGISTRATION:**

Name.....First Name.....  
 Position.....  
 Company.....  
 Address.....  
 E-mail.....Tel.....

<b>GLOBAL IMPACT INVESTMENT STRATEGY</b>	<b>Fee includes Refreshments, Buffet Lunch, a Full Documentation Package and the electronic speaker presentations sent to each delegate at the end of the conference</b>
<input type="checkbox"/> <b>Yes, I wish to register *</b> May 15 <sup>th</sup> & 16 <sup>th</sup> , 2019, Mövenpick Hotel, Geneva Code C1920	
<input type="checkbox"/> <b>Yes, I wish to book a room at Mövenpick Hotel</b> At the special ESAFON rate of 200 CHF (cut off date: April 10th 2019)	
<input type="checkbox"/> <b>Standard Registration Fee</b>	<b>600 CHF</b>
<input type="checkbox"/> <b>Special Early Registration Fee for Registration &amp; Payment by April 19<sup>th</sup> 2019</b>	<b>400 CHF</b>
<input type="checkbox"/> <b>Special Early Registration Fee for group of 2 persons and more, for Registration &amp; Payment by April 19<sup>th</sup> 2019</b>	<b>300 CHF per delegate</b>
<b>Date:</b> .....	<b>Signature:</b> .....

\*Please tick the applicable box

- Yes, I will pay by wiring transfer upon the receipt of my invoice
- Please send the invoice to the following address:

**Name, Job Title:**.....

**Address:**.....