ROUNDTABLE CFA SOCIETY SWITZERLAND

Evolving Trends in ESG Client Demands

Donnerstag, 28. April 2022, 13:00 - 13:40 UHR

SEMINARRAUM 4
English

Referent(en): Sandra Cafazzo, Ulrike Kaiser-Böing

Moderation: Sheila Ohlund

Sandra Cafazzo

CFA, Head of Sales Switzerland at Robeco Switzerland

Sandra Cafazzo is Head of Sales Switzerland and a Member of the Executive Committee at Robeco Switzerland Ltd. Prior to joining Robeco in 2020, she was Senior Vice President at PIMCO Switzerland focusing on business development and client servicing for institutional clients. Prior to that, she held sales positions at Merrill Lynch and Wellington Management in London. She began her career at UBS in 2001, initially on the portfolio management side and later in advisory. Sandra is a CFA charterholder and completed an MBA at London Business School. She also serves as board member and Vice President of the CFA Society Switzerland.

Ulrike Kaiser-Böing

CFA, Country Head Switzerland, Degroof Petercam Asset Management

Ulrike is the Country Head Switzerland for Degroof Petercam Asset Management. Prior to this she worked in different business development and client relations roles at Carnegie Fund Services Limited in Geneva, at Bank SYZ, and at Candriam (formerly Dexia AM) heading the Swiss Branch. She started her career as an equity analyst and later as a relationship and project manager in the institutional business at Lombard Odier. After earlier turns on the CFA Society Switzerland Board, she rejoined the Board in 2014.

Sheila Ohlund

CFA, CPA, CEO of CFA Society Switzerland

Sheila is CEO of the CFA Society Switzerland. She has over twenty years of investment experience at major financial firms. She was a Partner at SBC Brinson, and following its merger with UBS was responsible for portfolio management and research. Previously, she was Executive Director and Head of Research at Rothschild Bank in London and Zürich. Prior to working at Rothschild Bank, she was responsible for global equity thematic investment at American Express's international asset management in London.

She started her career as a Certified Public Accountant (CPA) with Price Waterhouse. Sheila has the chartered financial analyst (CFA) and ESG Investing certificates. She has masters degrees from the Massachusetts Institute of Technology (MIT) and the London School of Economics as well as an Innovation and Entrepreneurship Certificate from Stanford University.