

ROUNDTABLE CFA SOCIETY SWITZERLAND

Evolving Trends in ESG Client Demands

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

SEMINARRAUM 4

English

Speaker(s): Sandra Cafazzo, Ulrike Kaiser-Böing

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.

Steve Rodgers

CFA, Founder and owner of Kanoa Consulting

Steve is founder and owner of Kanoa Consulting providing financial services advice. Prior to moving to Switzerland in late 2018, he served as Chief Investment Officer & Executive Vice President at Bank of Hawaii in Honolulu. He managed an investment team there that oversaw over \$7 billion USD of discretionary assets for institutional and high net worth clients. Prior to that he worked in the bank's Treasury department managing the bank's asset/liability analytics, investment portfolio, as well as collateral, liquidity, and F/X exposures.

Steve received his BA degree from Amherst College in Massachusetts and his MBA degree from the University of Hawaii at Mānoa. He also served on the board of CFA Society Hawaii for 12 years and as its President from 2011-2013. After having been an active volunteer for CFA Society Switzerland since arriving here, he joined the CFA Society Switzerland Board in 2020.