



CONVENTION OF INDEPENDENT
FINANCIAL ADVISORS

A Non-Profit Foundation

A Non-Governmental Organization in special consultative status
with the Economic and Social Council of the United Nations

PRELIMINARY PROGRAM
XIITH INTERNATIONAL CIFA FORUM
MONACO, 23-25 APRIL 2014

THE NEW PARADIGM FOR WEALTH MANAGERS

Freedom, regulation, transparency, taxes, rule of law, expropriation, privacy and much more!

Wednesday 23 April

15:00 Opening Ceremony

16:00 ECOSOC Roundtable with UN High representatives and the Civil Society:

Addressing ongoing and emerging challenges for meeting the Millennium Development Goals in 2015 and for sustaining development gains in the future.

Moderator: Hanifa D. Mezoui, Ph.D., Senior Advisor, Humanitarian Affairs and Civil Society, Office of the United Nations High Representative for the Alliance of Civilizations, New York

Confirmed Speakers:

Me François Lorient, President Bar Association for Inter-Governmental Organizations and Vice-President AIFOMD (UN-MDG training)

Ruth Engo Bamela, President, African Action on AIDS (AAA)

Pamela Bernabei, Secretary General, International Ontopsychology Association

Andrei Abramov, Chief, DESA NGO Branch

Steve Young, Global Executive Director, Caux Round Table, St. Paul, Minnesota, USA

17:30 Protection of the private sphere, fight against terrorism and internet surveillance: how to reconcile these priorities?

• Fight against terrorism / does the endeavor towards security require the total destruction of the private sphere, public freedom and economic liberties?

• Is the protection of the private sphere compatible with internet?

• Uncertainties over the ownership of data on the internet: consumer/individual ownership or bank/corporation ownership?

Moderator:

Pierre Christodoulidis, President, CIFA, Geneva, Switzerland

Confirmed Speakers:

Hans Geiger, Dr. oec. publ., Prof. Emeritus University of Zurich, Switzerland

Raegan MacDonald, Senior Policy Analyst, Access, Brussels, Belgium

Daniel Cooper, Partner, Covington & Burling, London, UK

18:15 End of the first day

19:30 Cocktail

Thursday 24 April

8.55 Welcome address by the Day Chairman

Myret Zaki, Deputy Editor in Chief, Bilan Magazine, Geneva, Switzerland

9:00 THEME 1

World growth: After the Crisis, the Recovery? Is the liquidity created by central banks sufficient to create growth?

- How sustainable is the recovery in the U.S. and Japan?
- How serious are deflation risks in the Euro zone?
- Can emerging markets save the world economy?
- The new engines for growth:
 - NBIC : Nano Bio Information Communication
 - Green growth
 - Sustainable economy
 - From "Baby boom" to "Grandpa boom"
 - After the BRICs, Africa?

Confirmed Speakers:

Michel Girardin, Founder of MacroGuide, Lecturer at the University of Lausanne and Geneva, Switzerland

Olivier Ferrari, Founder and CEO, CONINCO Explorers in finance SA, Vevey, Switzerland

Patrick Lecoy, Managing Director, Export Assistance and Development, Monaco

10:30 Coffee Break

11:00 THEME 2

SME financing and large enterprises: What challenges and innovative solutions for the future?

Confirmed Speakers:

Steve Young, Global Executive Director, Caux Round Table, St. Paul, Minnesota, USA

Jean Rognetta, President, PME Finance, Paris, France

12:30 Networking Lunch

14.00 Life insurance: Luxembourg, international centre of expertise

Introduction by **Lynn Robbroeckx**, Communication Manager, Luxembourg for Finance

Moderator: Marc Hengen, CEO, ACA

Experts:

Caroline Bohrer, Sales Director, Swiss Life (Luxembourg)

Maël Toledano, Country Manager France, IWI International Wealth Insurer

Eric Winter, Commercial Director, Foyer International

Brice Casadejus, Country Manager France, Lombard International Assurance

15:00 THEME 3

Liberal economy and taxes: two incompatible notions?

- What lies behind the fight against tax evasion? What are the real (non-fiscal) issues of the fight against tax havens and tax fraud (controls of capital movements, infringements on private/economic liberties and to the private sphere, US attempts to control the management of offshore funds in the US, competition with other financial centers such as Switzerland, double standard policies)
- Is a worldwide fiscal state compatible with the preservation of the economic liberties of the investor and the individual saver?
- Global economies and national taxes: what would be the principles for fair and efficient tax regimes / incentives for work income (risk based approach), capital, and its revenues?

Confirmed Speakers:

Daniel Mitchell, Senior Fellow, Cato Institute, Washington, USA

William K. Black, Member of the Advisory Board, Associate Professor of Economics and Law, University of Missouri, Kansas City, USA

Vincent Bénard, Former president of the Hayek Institute in Brussels, Senior Analyst at the Turgot Institute, Paris, France

Lord Daniel Brennan, Co-chairman the advisory board of the Washington-based think-tank Global Financial Integrity, Bar representative on the Council of the International Bar Association

16:30 Coffee Break

17:00 THEME 4

Real economy and « financialized » economy: which one is the right model?

- Globalization or de-globalization?
- Growth or negative growth?
- Financial engine failure of the bank credit: what are the alternatives to continue financing the real economy?

Confirmed Speakers:

Leong Sze Hian, Past President, Society of Financial Service Professionals, Singapore

Louise C. Bennetts, Associate Director of Financial Regulation Studies, Cato Institute, Washington, D.C., USA

Roger Nightingale, Economist, RDN Associates Ltd, London, UK

Gretchen Morgenson, Assistant business and financial editor, The New York Times, USA

Lenore Elle Hawkins, MBA, Partner, Meritas Advisors, San Diego, USA

18:30 End of the second day

20.00 Patrons' Dinner at the Hotel Hermitage by invitation only (Black tie suggested)

Friday 25 April - Association Day

9:45 Day's chairmen Welcome Address

Vincent Derudder, President of FECIF

Zoltan Luttenberger PhD

10:00 The six historical forms of liberalism

Confirmed Speaker: Philippe Poirier, Associated Professor (Political Science), Team leader (political studies) of the Luxembourg Parliament, Luxembourg

10:30 New Trends in Financial Advise.

- FLP Financial Life Planning: What makes the difference?
- Cross Border Planning - a challenge?

Confirmed Speakers:

Shawn Brayman, FPA (US) Board member, President of Planplus Inc., Canada

Michael Lodhi, Chairman, The Spectrum IFA Group, Luxembourg

Thomas Abel CFP, President, NFPB Network Financial Planners, Germany

Marta Gellova, FECIF Board Member, Czech Republic

11:20 Links between Corruption and Organized Crime

Confirmed Speaker: Gilles Duteil, Director of CETFI, Aix-Marseille University, Aix-en-Provence, France

12:00 Coffee break

12:20 The World after Commissions - From Sales to Advice

Confirmed Speakers:

Daniel Nicolaes, Chairman, BzB, Belgium

David Charlet, Chairman, ANACOFI, France

Vania Franceschelli, Responsible Foreign Affaires, ANASF, Italy

Aldo Varenna, FECIF Board Member, Italy

Paul Stanfield, CEO, FEIFA, England

13:10 The Suitability and Fiduciary standards

Confirmed Speakers:

Paul Resnik, Co-Founder, FinaMetrica, Australia

Tobias Maag CFP, Board member, FPSB, Brazil

Tony Mahabir, Chair, CIPFs, Canada

Robert van Beek, Chair, FPA Belgium, Board member, FPSB Netherlands

Susan Jordan BSc, Director, PBP, England

Anna Vasilyeva, Head, Sberbank Premier, Russia

14:00 End of the Forum