



### **SOCIALLY RESPONSIBLE INVESTMENT**

#### **A KEY THEME AT**

### **THE SHOREX WEALTH MANAGEMENT FORUM GENEVA 2009**

**1-2 DEC 2009 – HOTEL PRESIDENT WILSON**

**WWW.SHOREXGENEVA.COM**

The Shorex Wealth Management Forum Geneva has always been the event where exciting new funds and investment ideas are introduced to Swiss professional investors, private bankers and independent asset managers - SRI funds are a fine example of that. At the event, not only do we look at who and what offers the best return, but we also explore the best fund vehicles to meet the investors' values and interests. This year the forum will feature Socially Responsible Investment with an exciting and interactive SRI funds panel discussion where delegates will be able to meet leading SRI experts and ask questions about this buoyant and emerging sector.

#### **SRI Theme at this year's Wealth management Forum**

The rapid development of socially responsible funds, durable performance funds and thematic funds not only in Europe but across the globe has produced new sustainable compliant products and structures. Individual or collective socially responsible investment (SRI) management is booming, driven by product innovation and strong client demand. SRI funds permit excellent returns by investing in companies that contribute to and best adapt to the shift to a more sustainable society. Those funds have expanded rapidly and their ratings shifted dramatically upward. The performance in these ratings has become sharp and hard to dismiss.

The Shorex Wealth Management Forum will feature this year a series of presentations and a panel discussion dedicated to SRI research and SRI funds.

#### **Topics Include:**

- Identifying new investment opportunities driven by global sustainability challenges
- Empowering investors to make choices about how, and where to invest
- Responding effectively to investors' values through ethical screening
- Promoting improvement and addressing risks through active corporate engagement
- Contributing to the creation of an environmentally sustainable, and socially responsibly economy and society
- Understanding & shaping the market through policy dialogue
- SRI investment vehicles: Funds, Bonds, structured products and ETFs
- SRI indexes

#### **A B2B platform to present and distribute SRI funds to HNWI's through private banks, independent asset managers and family offices:**

For the 8th year, the leading annual forum for the wealth management industry will attract over 1500 participants from Switzerland and other countries. The exhibition and conference is a unique platform where SRI fund managers can present new ideas to Europe's largest gathering of private banks, independent asset managers and family offices. More info: [www.shorexgeneva.com](http://www.shorexgeneva.com)



### An Opportunity for SRI Fund Managers

The Shorex Wealth Management Forum Geneva are offering this year the opportunity for a select number of SRI institutions to exhibit at the forum, present their funds, speak at the conference and take part in the SRI panel discussion.

The various packages available include:

**Package 1:** Display Panel \* + Table & Chair

The display panel is produced by Shorex with your graphics (width=1m height=2.5m). It is like a mini stand ideal for one person where you need no preparation, no extra cost and can arrive on the day with your brochures.  
£4,995 +7.6% VAT (\*)

**Package 2:** Conference Presentation + 1 Page of Advertising in catalogue  
£8,995 +7.6% VAT (\*)

**Package 3:** Stand 6 sq m (3x2m) + 1 Page of Advertising in catalogue  
£8,995 +7.6% VAT (\*)

**Package 4:** Stand 6 sq m (3x2m) + Conference presentation  
£11,495 +7.6% VAT (\*)

**Package 5:** Stand 6 sqm (3x2m) + Conference Presentation + 1 Page of Advertising in catalogue  
£13,495 +7.6% VAT (\*)

All stand packages include:

- Panels & fascia (shell scheme)
- Invitation of stand members to the cocktail reception
- Free entry (full company details + 100 words) in the exhibition catalogue (A4).

\* VAT is not applicable to companies based outside Switzerland and with no office in Switzerland

### Official SRI Sponsor

One institution can take a leading role as the Official SRI Sponsor of the two day event. Shorex have created a tailored SRI sponsorship package that will allow you to:

- Target the leading Swiss private bankers and independent asset managers
- Receive powerful exposure to the Swiss wealth management community while gaining international coverage in the world of asset management
- Receive all the benefits of being a Shorex Wealth Management Forum sponsor including focused attention on SRI funds, enhanced press coverage and increased networking opportunities.

### Official SRI Sponsor Package

- 9 Square Meter Exhibition Stand
- First Workshop Presentation on SRI Funds
- Chairing of the SRI Funds Panel Discussion
- Logo as Official "SRI Sponsor" on all conference programmes and materials
- Full A4 page advertisement in the show catalogue
- A two page editorial in the show catalogue introducing the theme
- Promotion on the event website as "Official SRI Sponsor"
- 100 invitations

Cost £24,995 (+7.6% VAT if Swiss company)

For further questions,  
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