



LGT Venture Philanthropy

# Investing for Impact: Redefining the Meaning of Return

Course Conference on April 29th, 2016  
LGT VP House of Philanthropy Solutions, Zürich

University of St. Gallen Course FS16 8,748



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## Context

The theme of Impact Investing has gained substantial momentum in both, finance and social entrepreneurship communities over recent years. In addition student demand for course offers as well as supervision of theses on Impact Investing has risen steeply. The University of St. Gallen is actively responding to this demand by offering courses on related topics.

This course, titled *Impact Investing: Redefining the Meaning of Return* represents one of these offers and is taking place in March and April 2016 at Master level in the contextual study program of the University of St. Gallen.

Focused on activity based learning the course aims to deliver on three main goals: 1) gaining an understanding of the impact investing space, 2) researching and developing an investment structure for an Impact Investing opportunity and 3) pitching the investment structure to an imaginary investment board of an Impact Investing fund.

This document outlines the program for the second block of the course. To complement and consolidate classroom based learning, the group has the opportunity to meet and discuss with Impact Investing practitioners. Hosted by *LGT Venture Philanthropy*, Natija Dolic will present first on the panel outlining *LGT VPs* Impact Investing activities followed by a presentation of Luciana Lima on the interest of wealth holders in impact investing and the relevance for private banking at *Credit Suisse*. The concluding presentation on the panel will be held by Jaume Iglésies of *UBS* on the bank's initiatives and future perspectives on Impact Investing.

Following the presentations we will have ample time for exchange with the panelists before closing with a discussion round and reflections on the course work and learning outcomes.

## **Program**

**April 29. 2016, 14:00h - 18:00 LGT VP House of Philanthropy Solutions, Zurich, Switzerland**

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14:00h – 14:10h	Welcome
14:10h – 14:30h	One Minute Introduction of each Investment Proposal
14:30h – 14:50h	LGT Venture Philanthropy (Natija Dolic)
14:50h – 15:10h	Credit Suisse UHNWI and Impact Investing (Luciana Lima)
15:10h – 15:30h	UBS Values Based Investing (Jaume Iglésies)
15:30h – 16:10h	Q&A and Discussion
16:10h – 16:30h	Walk through the HOPS Exhibition
16:30h – 17:30h	Concluding Reflections, Course Evaluations and Farewell

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**April 29. 2016, 16:00h - 18:00 UBS Conferece Center Grünenhof**

## **Speakers**

### **Natija Dolic**

Natija Dolić is Head of Marketing and Communications at LGT Venture Philanthropy. Natija built the first “House of Philanthropy Solutions” – a unique exhibition that enables visitors to interactively explore philanthropic solutions on various topics from around the globe.

Prior to joining LGT VP, Natija worked as freelance journalist, as relationship manager with American Express, and pro bono communications manager for the German Red Cross. Natija studied Philosophy and English Literature at the Princeton University, holds a Master’s degree in International Business & Cultural Science, and Journalism from the University of Passau. Natija is a native Croat.



### **Jaume Iglésies**

Jaume Iglésies is Head of Values Based Investing at UBS AG, responsible for advising on investment solutions that consider social and environmental values alongside financial returns. Prior to joining UBS in 2005, he worked for 11 years at Deutsche Bank SA in the financial planning unit, where he was responsible for product management.

Jaume is a full member of the International Actuarial Association and holds a Bachelor’s Degree in Mathematics and Economy.



**Luciana Lucena de Lima**

TBC

## Logistics

### LGT VP, Zurich, Switzerland

**Date:** 29.04.2016

**Time:** 14:00h - 17:30h

**Venue:** LGT VP House of Philanthropy Solutions  
Färberstrasse 6, CH-8008 Zurich

[Link to map](#)

**Getting there:** From Zürich Main Train Station please take any Tram or S-Bahn to either Bellevue or Stadelhofen. LGT VP are less than a 15 min walk from either of the two stations and you can find walking directions in the map below.

**Meeting Point:** The group will meet at 13:50h in front of the building

