



Press Release

"Wealth Management & Family Offices Forum."

Tuesday, 17th of May 2011

"B&M Theocharakis Foundation for the

Fine Arts and Music" - 9 Vas.Sofias Av. & Merlin Str.

For the **2nd time in Greece**, the "Wealth Management and Family Offices" Forum took place at the B&M Theocharakis Foundation for the Fine Arts and Music place in central Athens, Greece.

At the first panel with the title "**Alternative Assets & Investment Opportunities**" Mr. **Grassano Pietro**, Executive Director, Head of Greek Sales at J.P. Morgan Asset Management presented different ways and strategies to invest to commodities, Mr. **Kanaginis George**, CEO of Piraeus Wealth Management, a joint venture with BNP Paribas Wealth Management pointed out that even Hybrid investments (a small market share) go after the \$84 trillion pie, they represent an excellent opportunity for growth and Mr. **Land Stephen**, Portfolio Manager at Franklin Templeton Investments, USA, analyzed the benefits of Natural Resources Investments. Coordinator of the panel was Mr. **Ladopoulos Athanasios**, Senior Partner & Senior Portfolio Manager at Swiss Investment Managers GmbH.

At the second panel with the title "**Portfolio Managers' Selection**" Mr. **Holmes Timothy**, Managing Director at Risk Advisors - San Francisco Sentry, USA, analyzed the investment philosophy of the organization as well as the methodology under which they pick up fund managers. Dr. **Siokos Stavros**, President at Sciens Fund of Funds Management, UK, analyzed managed accounts versus fund investments and the fund managers' selection methodology of his organization. Coordinator of the panel was Mr. **Goudinacos Stratos**, Member of BoDs at ATE Bank.

At the third panel with the title "**Macro-Investment Outlook for Greece and Global**" Dr. **Monokrousos Platon**, Assistant General Manager, Head of Financial Markets Research Division at EFG Eurobank Ergasias analyzed the Global economy & markets, the Euro area sovereign debt crisis as well as the Greek stability program.

The Round Table Discussion took place at the end of the forum with the participation of Dr. **Handjinicolaou George**, Chief Executive Officer at TBANK, Mr. **Elliot Tom**, Vice President, Global Strategist at J.P. Morgan Asset Management and Mr. **Goudinacos Stratos**, Member of BoDs at ATE Bank.

The forum provided a comprehensive networking platform for businessmen, wealthy investors, professional investors & advisors.

Organizers:

The organizers of the forum were Financial-Academy.eu and Derivatives.gr

Financial-Academy started its activities in June of 2010 to provide training for professionals in the market from other reputable professionals involved either in the Greek market or in the foreign arena. The Goal is to create the appropriate field of training for quick implementation and transfer of knowledge into practice.

Derivatives.gr began its operations in 2000. Among initiatives were its investment community, the Digital Weekly Magazine with weekly market analysis, which has been published in more than 250 issues, the organization of 8 specialized and thematic conferences (www.forumsbyderivatives.gr) and the www.tradeview.gr site providing trading ideas and signals to the Greek investors on different asset classes.



www.wealth-management.c



European-forums.eu

event

Press Release

"Wealth Management & Family Offices Forum."

Tuesday, 17th of May 2011

"B&M Theocharakis Foundation for the

Fine Arts and Music" - 9 Vas.Sofias Av. & Merlin Str.

Sponsors of the Conference

- Platinum Sponsor: **J.P.Morgan Asset Management,**
- Golden Sponsor: **Piraeus Wealth Management, a joint venture with BNP Paribas Wealth Management,**
- Silver Sponsor: **San Francisco Sentry Risk Advisors**
- Official Partner: **Association of Greek Investment Companies and Mutual Fund Management Companies,**
- Official Sponsors: **CEO Clubs Greece, Hellenic CFA Society,**
- Printed Media Sponsors: **Kefalaio, ELNAVI, Kathimerini-International Herald Tribune,**
- Online Sponsor: **Capital.gr,**
- Online Supporters: **Valuation and Research Specialists, Tradeview.gr, Nautilia.gr, Maritimes.gr, EMEA Business Monitor,**
- Public Relations Sponsor: **Action Global Communications,**
- Scientific Contributor: **ALBA Graduate Business School,**
- TV Sponsor: **Channel 9**

*For more information please either visit www.wealth-management.gr
or call at +30.210-6846329*