

## The Key Factors that Influence Trust in a Family Office Banking Relationship

### STEP LUNCH MEETING / ZURICH CENTRE

#### SPEAKER

Dr Roderik J. P. Strobl, Relationship Manager Key Clients, Leo Trust Switzerland AG [www.leotrust.ch](http://www.leotrust.ch)

#### DATE

Thursday, 26 August 2021

#### TIME

	12.00 – 14.00 hrs.
Registration	11.45 – 12.00 hrs.
Talk and Questions	12.00 – 13.00 hrs.
Lunch and Coffee	13.00 – 14.00 hrs.

#### VENUE

Hotel Glockenhof Zürich  
Sihlstrasse 31, 8022 Zürich, 044 225 91 91  
[www.glockenhof.ch](http://www.glockenhof.ch)

#### REGISTRATION

by 25 August 2021  
to [events@step-ch-fl.com](mailto:events@step-ch-fl.com)

#### CPD

1 hour towards CPD obligation

#### FEE

	CHF
Members	80.00
Non-Members	100.00
STEP Students	50.00

#### CONDITIONS

Reserved places will be charged, unless cancelled 24 hours before the event.

#### SUPPORTED BY



Yours sincerely,  
**STEP Office Zug**

Corinne Graf  
Administration/Events

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**T: +41 (0)41 727 05 27 F: +41 (0)41 727 05 21 E: [info@step-ch-fl.com](mailto:info@step-ch-fl.com) UID: CHE-114.502.372**  
Verein STEP, Neugasse 12, 6300 Zug

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**STEP LUNCH MEETING / ZURICH CENTRE**  
Hotel Glockenhof Zürich / Thursday, 26 August 2021 / 11.45 hrs.

**TOPIC**

**The Key Factors that Influence Trust in a Family Office Banking Relationship**

Trust is without doubt a vital psychological concept in human and business relationships, specifically in Swiss family office banking relationships. In this lecture, we will discuss the following topics of the doctoral dissertation:

- What the literature review revealed
- Research philosophies used
- Qualitative methodology, implementation and results
- Quantitative methodology, implementation and results
- Discussion of prime research questions
- Conclusion and implications

Questions can be submitted by email to [events@step-ch-fl.com](mailto:events@step-ch-fl.com) in advance or asked during the lecture.

**SPEAKER**

**Dr Roderik J. P. Strobl, Relationship Manager Key Clients at Leo Trust Switzerland AG**

Roderik is an empirical trust researcher in the Swiss financial sector. He is experienced in advising wealthy private and institutional clients in the respective field of wealth management, corporate strategy, knowledge management, business development, structuring and other related financial services such as cryptocurrencies. His expert knowledge includes the fiscal and legal analysis, proposal and implementation of bespoke compliant wealth structuring instruments to multi-layered client relationship management services for family offices and models in key OECD white-listed jurisdictions. He has worked on numerous bank projects related to the introduction new regulations, bank directives and leads current working groups such as the Swiss 1<sup>st</sup> revision CRS group and GDPR working group at STEP.

He holds a BBA (including business economics, law and tax law) with a major in marketing, an MBA in international marketing, an EMBA in international business, a DBA/PhD in business administration and empirical trust research and a certification in investment counselling. He has been a full member of STEP since June 2008 and joined the STEP Zurich committee in December 2010, where he currently acts as its Chairman since September 2017. He coined the expressions 'digital presence' and 'virtual director' at STEP Zurich. For 2020/2021, he has been appointed as the Chairman of Verein STEP and Secretary of the Swiss and Liechtenstein STEP Federation (SLSF). Roderik formerly worked, inter alia, as a senior adviser and manager at Crédit Agricole Indosuez (Switzerland) AG, Credit Suisse Trust AG and Cititrust (Switzerland) Ltd.

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July 2021