

Trustee Investment Results – A quarterly economic, market and peer analysis from a Trustee perspective

STEP WEBINAR - LUCERNE/ZUG CENTRE

SPEAKER

James Day, Peritus Investment Consultancy
www.peritus.ch

DATE

Thursday, 7 October 2021

TIME

	16.30 – 18.00 hrs.
Registration	16.30 – 16.35 hrs.
Talk and Questions	16.35 – 18.00 hrs.

WEBINAR

Link and presentation will be sent in advance.

SPONSORED BY



LEO TRUST
— ZÜRICH SINCE 1980 —



Yours sincerely,
STEP Office Zug

Corinne Graf
Administration/Events

REGISTRATION

by 6 October 2021
events@step-ch-fl.com

CPD

1 ½ hour towards CPD obligation

WEBINAR - FEE

	CHF
Members	40.00
Non-Members	50.00
STEP Students	30.00

CONDITIONS

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

SPONSORING our events, always WORTHWHILE! Our STEP Office will be pleased to assist you, 041 727 05 27.

T: +41 (0)41 727 05 27 F: +41 (0)41 727 05 21 E: info@step-ch-fl.com UID: CHE-114.502.372

Verein STEP, Neugasse 12, 6300 Zug

STEP WEBINAR - LUCERNE/ZUG CENTRE

Thursday, 7 October 2021 / 16.30 hrs.

TOPIC

Trustee Investment Results – A quarterly economic, market and peer analysis from a Trustee perspective

Peritus provide their trust performance monitoring relationships with a quarterly presentation update to help understand from a trustee perspective the many influences affecting the world economy and investment markets.

James will provide a presentation from the context of a Trustee reviewing their many portfolios and investment managers to assess what has supported and impeded the results. The major markets will be reviewed, fixed income, interest rates, inflation and currency movements as well as topical subjects such as China, Cryptocurrency and the Biden stimulus.

The results of the peer group will be discussed in the context of the general positioning of the investment industry. The presentation will have a cross section of interesting graphs and humour! The goal is to take a complex subject and make it interesting and understandable for all.

SPEAKER

[James Day, Founder and Managing Director, Peritus Investment Consultancy](#)

James is the Founder and Managing Director of Peritus Investment Consultancy, established to provide independent and impartial guidance to the trust industry, high net worth individuals and family offices. James regularly assists clients in both the monitoring and selection of their asset managers, more specifically covering investment profiling, strategic and tactical asset allocation and the identification of appropriate top quartile asset managers.

He is an Economics graduate of Southampton University, a Fellow of the CISI and a holder of the CIM Diploma. James commenced his career in London working for an asset management partnership, Earnshaw Haes, before moving to manage portfolios at Morgan Stanley Quilter. ABN AMRO later hired him to oversee their asset management teams in Jersey and this role grew to also become head of private banking. Following this, James was hired to create an investment consultancy platform at Ernst and Young prior to establishing Peritus in 2003.

James is a regular participant on Family Office Investment Boards, is a judge for the Wealth Briefing Swiss Awards and Incisive Media Research Awards and is regularly called as an expert witness on Trust Investment related litigation cases.

September 2021/cg

T: +41 (0)41 727 05 27 F: +41 (0)41 727 05 21 E: info@step-ch-fl.com UID: CHE-114.502.372

Verein STEP, Neugasse 12, 6300 Zug