

Cross-border and Pan-European Pensions: Why We Do Support Them



**Launch Event of Cross Border Benefits Alliance – Europe
The 6th December 2017**

**Location: Science 14 Atrium,
14b rue de la Science, 1040 Brussels (EU Quarter)**

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About us



The Cross Border Benefits Alliance-Europe (CBBA-Europe) is a new Brussels-based advocacy organization, aimed at promoting the creation and development of cross-border/pan-European employee benefit plans in Europe, including – but not limited to – pensions, healthcare, disability, long-term care, or programs for the well-being/wellness of people in the workplace and private life.

The Alliance is strongly convinced that the current national barriers to the creation of cross-border employee benefits represent a useless burden and foolish costs for sponsor companies and future beneficiaries. Therefore, CBBA-Europe advocates the EU and its Member States to remove such obstacles, being them of legal, taxing, administrative, or political nature. Economies of scale, simplicity in administration, full portable social benefits, costless mobility of workers and consistent taxation formulas would be beneficial for both, the EU internal market and the European Social Model. In addition, huge capitals potentially accumulated by these pan-European funds might be invested in the European economy, and contribute to the completion of the Capital Markets Union (CMU).

More in general, the Alliance strongly believes that the economic and social objectives in the EU are not – and should not be – in conflict, but they can rather go hand-in-hand, and be beneficial to each other: a “social market economy” is clearly mentioned in the Treaty on the European Union as a typical feature of the EU (article 3.3).

The Alliance is extraordinarily transversal with regards to its members: heterogeneous entities are – and always will be – welcome to be part of the Alliance, such as multinational sponsor companies operating in several Member States of the EU, sector-wide employee benefit funds including representatives of the employers’ and workers’ side, national and European trade unions, insurance, mutualistic and bilateral social protection (benefits) providers; industry of the social protection such as pension or healthcare funds administrators, actuaries, lawyers or consultants; academic representatives; consumers’ organizations; national and international associations representing companies, social protection funds, professionals in the field, etc.

CBBA-Europe aims at interacting with the EU institutions, national governments and supervisory authorities, by raising questions in need of solutions on behalf of its members, and proposing its normative and practical solutions. The first institutional goal of the Alliance is to be recognized as an influential, valid and constructive interlocutor of the decision-makers, by participating in working groups, drafting reflection papers, creating reports, organizing public events, etc. Its internal organization will be made up of a General Assembly, a Board of Directors, and technical and strategic committees.

A scientific council of academic experts is being created at the moment, and it is expanding very fast.

The more we are, the stronger we will be: if you are interested to join us, whatever your background is, please contact us: info@cbba-europe.eu

*Francesco Briganti,
Secretary General*

Cross Border Benefits Alliance - Europe (CBBA-Europe)

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Programme

9.30 / 10.00	Registration and welcome coffee
10.00 / 10.15	OPENING <i>Francesco Briganti</i> , Secretary General of the Cross Border Benefits Alliance – Europe (CBBA-Europe)
10.15 / 10.45	Cross-border and Pan-European Pensions: Where Do We Stand? <i>David Eatock</i> , DG for Parliamentary Research Services, European Parliament <i>Nathalie Berger</i> , DG FISMA, European Commission
10.45 / 11.10	KEY NOTE SPEECH: Cross-border and Pan-European Pensions: The Perspective of EIOPA <i>Gabriel Bernardino</i> , Chairman of the European Insurance and Occupational Pensions Authority (EIOPA)
11.10 / 11.30	Coffee break
11.30 / 11.45	Cross-border Pensions: Potential, Solutions and Existing Obstacles <i>Renee McGowan</i> , Mercer Global Leader
11.45 / 12.45	FIRST SESSION: Cross-border Pensions at Company (Multinational) Level in Europe <i>Jean-François Gavanou</i> , Atos, and FOPE network <i>Griet de Bevere</i> , Wolters Kluwer <i>Lukasz Budzynski</i> , Sanofi and member of the OPSG, EIOPA <i>Paolo Lippi</i> , Generali Employee Benefits Network Moderator: <i>Eric Müller-Borle</i> , Founder and Publisher, Global Benefits Vision magazine
12.45 / 13.45	Lunch

13.45 / 14.10	KEY NOTE SPEECH: Cross-border Pensions and Pension Rights of Mobile Workers in North America <i>Phyllis Borzi</i> , former Obama Administration's Assistant Secretary for Employee Benefits Security of the US Department of Labor
14.10 / 15.10	SECOND SESSION: Cross-border Pensions at Multi-employer/Sector-wide Level in Europe <i>Christian Lemaire</i> , Amundi pension fund <i>Indi Seehra</i> , RESAVER, Pan-European pension fund for researchers <i>Damien Lagaude</i> , the European services workers union (UNI) and member of the OPSG, EIOPA <i>Olga Ruf-Fiedler</i> , The DOW Chemical Company <i>Ian Veitch</i> , Corporate Life & Pensions, Zurich Moderator: <i>Jacqueline Lommen</i> , State Street Global Advisors
15.10 / 15.30	Coffee break
15.30 / 16.30	THIRD SESSION: The Asset Gathering Power of Pan-European Pensions: Strengthening Economic Growth and ESG Mainstreaming Across the Union <i>Rick Watson</i> , Association for Financial Markets in Europe (AFME), and member of the IRSG, EIOPA <i>Laura Merlini</i> , Chartered Alternative Investment Analyst (CAIA) Association <i>Eric Perée</i> , European Investment Bank (EIB) <i>M. Nicolas J. Firzli</i> , World Pensions Council (WPC) <i>Hans-Jörg Baumann</i> , StepStone Global Moderator: <i>Sophie Baker</i> , Investments magazine (P&I)
16.30 / 16.45	CONCLUSION OF THE EVENT: <i>Martino Braico</i> , Vice President of the Cross Border Benefits Alliance – Europe (CBBA-Europe)

Our Speakers



Sophie BAKER

Sophie Baker is Pensions & Investments' London bureau chief. Ms. Baker covers institutional investment and money management in the U.K. and Europe. Prior to joining P&I, she was investor services reporter at Financial News, which is owned by Dow Jones & Co. She has also worked as editor at FStech and as news editor at Pensions Age and European Pensions. She has a Bachelor of Arts degree in comparative literature, specializing in English literature and modern and medieval Spanish literature, and a post-graduate diploma in magazine journalism.

Hans-Jörg BAUMANN

Mr. Baumann is the chairman of StepStone Private Debt and StepStone Hedge Funds. As member of the management team he is responsible for business development activities. He also is the chairman of the Swiss Alternative Investments Circle (SFAMA).

Before founding Swiss Capital Alternative Investments AG, Mr. Baumann was a key function holder, head of trading and sales fixed income Switzerland for UBS. Mr. Baumann was also a member of UBS's global trading and sales management board in Zurich.

Mr. Baumann received his MBA from the University of Zurich.



Nathalie BERGER

Nathalie leads the European Commission Unit in charge of Insurance and Pensions since May 2015. Prior to taking up this position, Nathalie was since July 2012 Head of Unit responsible for Audit and Credit Rating Agencies. She previously worked as an expert in company law and corporate governance, and from 2007 onwards as a Deputy Head of Unit in charge of Relations with the European Parliament and Council as well as Policy Coordination.

Nathalie started her career as a lecturer and consultant for a banking group. She joined the European Commission in 2000, mainly responsible for the development of Commission implementing powers in the field of financial services. She was a member of the Commission Task Force on the Future of the European Union and an advisor to the Commission representatives at the European Convention. A French national, Nathalie holds a Ph.D. Doctorate in Law and a Bachelor of Arts in Politics. She is the author of several articles and a book on European law and policies.

Gabriel BERNARDINO

Gabriel Bernardino is Chairman of the European Insurance and Occupational Pensions Authority (EIOPA). He is responsible for the strategic direction of EIOPA and represents the Authority at the Council of the European Union, the European Commission and the European Parliament. Mr. Bernardino prepares the work of EIOPA's Board of Supervisors and also chairs the meetings of the Board of Supervisors and the Management Board.

Mr. Bernardino is the first Chairperson of EIOPA. He was elected by the Board of Supervisors of EIOPA on 10 January, 2011. His nomination followed a pre-selection of the European Commission and was confirmed by the European Parliament after a public hearing held on 1 February, 2011. Mr. Bernardino assumed his responsibilities on 1 March, 2011 for a first five-year term. On 16 December 2015 the European Parliament confirmed the re-appointment of Mr Bernardino for a second five-year term, which started on 1 March 2016. Prior to his current role, Mr. Bernardino was the Director General of the Directorate for Development and Institutional Relations at the Instituto de Seguros de Portugal (ISP). He has served in several positions of increasing responsibility since he joined the ISP in 1989 and represented EIOPA's preceding organisation, CEIOPS, as Chairman between October 2009 and December 2010.





The Honorable Phyllis C. BORZI

Ms. Borzi was the Assistant Secretary of Labor for the Employee Benefits Security Administration (EBSA) in the Obama Administration from 2009 until 2017. EBSA regulates approximately 700,000 private-sector employer-sponsored retirement plans, approximately 2.3 million health plans, and a other plans providing benefits to approximately 150 million Americans. In that capacity, Ms. Borzi oversaw implementation of the Affordable Care Act (ACA). Ms. Borzi also represented the Secretary of Labor in the Secretary's role as statutory trustee for the Social Security and Medicare Trust Funds and as chair of the Board of the Pension Benefit Guaranty Corporation.

Previously, Ms. Borzi was a research professor in the Department of Health Policy at George Washington University. She also was of counsel with the Washington, D.C. law firm of O'Donoghue & O'Donoghue LLP, representing primarily jointly-trusted multiemployer plans.

From 1979 to 1995, Ms. Borzi served as pension and employee benefit counsel for the U.S. House of Representatives Committee on Education and Labor.

Martino BRAICO

Martino Braico is senior manager in Previnet, an independent service provider delivering pension scheme administration to the pension fund industry all over Europe.

As pension scheme administrator, Previnet manages over 2 mln members and over 220 pension funds.

In 20+ years of experience, Martino gained deep experience in all the pension matters.

Martino is in charge of the International Client Department, working on cross-border pensions solutions. Relevant examples are RESAVER OFP (IORP for researcher), Nestlé Middle-East OFP and the NATO DC plan (which is multi-country, multi-lingual and supports several currencies and funds). Other cross-border projects are still under NDA.



Francesco BRIGANTI

Francesco Briganti is currently the Secretary General of the Cross Border Benefits Alliance-Europe (www.cbba-europe.eu) organizer of this event, and CEO of EBWI, a public affairs company based in the EU quarter of Brussels (www.ebwi.eu). Francesco is also the Coordinator of the World Pension Alliance (WPA), a platform of the main worldwide pensions advocacy organizations (www.worldpensionalliance.org); a member of the OPSG of European Insurance and Occupational Pensions Authority (EIOPA); and Chair of the Italian branch of the International Employee Benefits Association (www.IEBA.org.uk). Former Director of AEIP (www.aeip.net), Francesco holds a Ph.D focused on the legal creation of a pan-European employee benefits plan.

Lukasz BUDZYNSKI

Lukasz Budzynski is a member of the Cross-Border User Group (XBUG) which is a discussion group for multinational companies who have operational or near-operational cross-border pension plans. He is the Global Head of Sanofi Pension Advisory, a Corporate Treasury unit created to support pension funds of Sanofi in their investments. As a member of several pension boards and investment committees in Germany, the UK, France, the US and other countries he is directly involved in management of DB, DC and savings plans with assets of more than 10bn EUR. He also has significant experience in topics like plan design, accounting and regulations. Additionally, he is a director of an IORP set up to provide retirement benefits to group employees in several European countries on a cross-border basis.





Griet DE BEVERE

Griet De Bevere holds a master in applied economics sciences with over 20 years of experience working for several multinational companies across different industries: Ernst & Young, Arthur Andersen, Lockton (Vanbreda Risk & Benefits) and Wolters Kluwer. Her current role is Global Benefits Director at Wolters Kluwer.

Griet is known to be a strategic thinker combined with a pragmatic hands on mentality experienced in operating in an evolving work environment influencing all levels within the organization.

David EATOCK

David is currently a pension policy analyst at the European Parliamentary Research Service, briefing MEPs (and publishing notes) on pension issues. He has also worked at the European Commission where he was lead drafter of the Commission's Green and White Papers on pensions (2010 and 2012). David has also held a number of pension-related roles at the UK's Department for Work and Pensions and HM Treasury including Head of Regulator, Defined Benefit and International Policy Team at DWP and Head of Pensions Regulation and Protection at HMT, including leading on annuities policy. He also researched and wrote the initial Government policy paper analysing increasing state pension age in the UK.



M. Nicolas J. FIRZLI, LL.M.

M. Nicolas J. Firzli is the Director-General of the World Pensions Council (WPC), the Paris-based international association of retirement, social security & pension reserve funds and Advisory Board Member for the World Bank Group Global Infrastructure Facility (GIF).

Mr. Firzli was one of the first experts to predict the prevalence of durably low interest rates after 2008 and their enduring impact on financial markets ('The Zero Return World'), the 2014–2016 oil glut and necessary transformation of fossil fuel-reliant developing economies ('Oil vs. Gas and the GCC Crisis') and the inevitability of the United Kingdom's withdrawal from the European Union ('A Frenchman Writes: Britain Should Say AdiEU').

Jean-François GAVANOU

Jean-François Gavanou (HEC, Actuary) is Senior VP Pensions & Insurance at Atos SE, a global IT services company with annual revenue of circa EUR 12 billion and more than 100,000 employees in 72 countries. After 10 years at Deloitte, he joined Atos in 2006 to supervise pension schemes and insurance globally. He is a Trustee or Board member of various Atos pension schemes in the UK, US and Germany. He actively participated in the creation of a European corporate platform to exchange best practices in the area of pensions. Co-author of "Governance Sociale & Fonds de Pension" (Economica, 2003) and the pension chapters of "Controlor-Auditor" (Dunod, 2006).





Damien LAGAUE

Project manager in collective health Insurance (Macif-Mutualité). Representative of employees at EIOPA OPSG stakeholders group. UNI (Union network International) activist and expert.

Graduate in sociology and European social protection systems, I led my career in the insurance sector. In parallel I joined CFDT French Union taking in charge financial regulation on insurance issues as activist. This drove me to the European level and, after being in charge of workers representation at national level in an official consultation organism, I have been selected to exert the same mandate at the EIOPA Insurance Stakeholders Group, at the European level.

Passing to the pension side, my purpose is to rise up the concerns of the European workers facing the uncertainty of pension regimes in the global framework of the European labor market.

Christian LEMAIRE

Christian Lemaire is the Global Head of Retirement Solutions at Amundi Asset Management.

Previously, he was the Global Head of Insurance clients and offered dedicated investment solutions including on Solvency II. Formerly, he held the post of Special Advisor of the Senior Management of Credit Agricole Group. Before that, he was Director of Finance, Strategy and Risks with the specialised financial services division of Credit Agricole. He was previously Senior Banker in charge of European Corporate clients within the Corporate & Investment Bank division.

Prior to joining the Credit Agricole Group 15 years ago, he held positions as Chief Financial Officer and Finance Director in Europe & US. Christian holds a Master of Engineering (Ecole Centrale Paris) & a MBA (HEC / Wharton) majoring in finance.



Paolo LIPPI

Paolo Lippi graduated in 1988 at the University of Paris II ASSAS in Social and Economic Administration, and in 1989 was awarded the DESS in «Gestion des entreprises» at the University of Panthéon Sorbonne, Paris. He also has a specialisation in Actuarial Sciences at CNAM Paris in 1991, and studied Stochastic Finance at UCL in Brussels in 2007. Paolo started working for Generali France in 1989 in the Financial Department as a Portfolio Manager. He moved to Brussels in 1996 (Generali Belgium) as Deputy Manager and headed up the internal control of Finance related activities. In 1999 he was promoted Deputy Director and was in charge of the creation of the ALM and Risk Management Department of Generali Belgium where he implemented the new Solvency II model (2004-2008).

On January 1st 2009, he joined Generali Employee Benefits and was appointed Head of the new Pension Unit.

Jacqueline LOMMEN

Jacqueline Lommen is Senior Pensions Strategist at State Street asset management (SSGA). In this role she is responsible for expanding State Street's position in the institutional asset management and retirement solutions market across the European Continent.

Jacqueline has been active in the international pension markets for more than 25 years. Her expertise is framed around implementing tailored pension solutions for large multinational corporates and financial institutions. She thereby leverages on her hands-on experience in the private as well as in the public sector and background as a regulator, pension trustee, pension provider and international consultant.





Renee MCGOWAN

Based in New York, Renée is Mercer's Global Leader for DC and Individual Wealth and is responsible for the global strategy and growth of the defined contribution segment. Prior to this role, Renee was the Chief Customer & Marketing Officer for Mercer in the Pacific where she was responsible for Mercer's retail pension business and investor servicing for Mercer's 1.3 million individual investors.

Renee has over 17 years' experience in the financial services industry across Asia, the Pacific and the United Kingdom. Renée frequently presents on topics such as global retirement trends and disruption, customer experience and technology wealth trends. You can contact Renee on LinkedIn.

Laura MERLINI

Laura Merlini, CAIA is Managing Director EMEA for the Chartered Alternative Investment Analyst (CAIA) Association. Laura has several years of experience throughout Europe in the alternative investments industry. She formerly worked at Credit Suisse (previously Fortis Prime Fund Solutions) in Milan, Madrid and Geneva. Laura co-founded the CAIA Iberia chapter in 2008 and she has led the CAIA Geneva committee since 2010. Laura earned a BA in Business Administration at Bocconi University in Milan, received the CEMS MIM (Community of European Management Schools) MSc in International Management in 2002 and completed the Executive Master in Positive Psychology, Leadership and Strategy from IE, Madrid in 2014. Laura is also a Certified Investment Fund Director by the CIFD Institute and a Member of the UN PRI HF Advisory Committee.



Eric MÜLLER-BORLE

Eric Müller-Borle is the founder of Global Benefits Vision digital magazine and website, the only publication devoted to global employee benefits / global mobility practitioners.

A CFA charterholder and HEC Paris graduate, he spent 14 years with AXA including 4 as the founding CEO of the MAXIS multinational pooling network and AXA's expat division. After a few years on the multinational corporate side, he founded a consulting firm advising insurance companies and mid-size brokers. He also is an independent director of Luxembourg-based insurance companies and captives and sits on the advisory board of CBBA-Europe. A French-German dual national, he is married to a global HR executive.

Eric PERÉE

Mr. Perée is an associate director and a PhD economist with over 25 years of experience at European Investment Bank. Initially in financial and risk management research, then as head of economics and financial studies and since 2010 as a key adviser on strategy, long-term investment and cooperation with private and public capital. Moreover, he is a member of the EIB pension board.

He is also closely associated with the works of others relevant to your topic, such as the Long-Term Investors Club, the European Association of Long-Term investors and as a member of the OECD financial markets committee and the G20-OECD taskforce on long-term investment.



Olga RUF-FIEDLER

20 years of experience in financial services industry. Successful track record in building up operations for insurance and reinsurance companies. Responsibility for setting up from scratch Life & Pensions branches of Swiss Re and ING. Various senior executive positions in (re-)insurance industry in Switzerland and abroad (e.g. Chief Underwriter Life Winterthur Group, country CEO ING Life & Pensions, Head Country Office at Swiss Re). Chairperson of the renowned international conference Unit-Linked Guaranteed Products Forum in London 2011-2016. PhD in Mathematics (Academy of Sciences Berlin), postdoctoral studies (Rutgers University US), Member of Swiss Actuarial Association. Olga joined Dow early 2016 as Head Pensions & Savings to take over the responsibility for pensions of Dow in the EMEA region and India.

Indi SEEHRA

Indi Seehra is Director of HR at LSE. He is an Independent Director for RESAVER, a multi-employer, multi-currency and multi-country Pension Scheme for organisations who are engaged in Research activity across Europe.

Indi's previous UK appointments include HR Director of the Crown Prosecution Service and subsequently the National Crime Agency. Over recent years he has been involved with respective European Union Task Groups looking to overcome the barriers to mobility for Researchers.

Indi has strong interest in benefits, including pensions, and specifically the use of Affinity benefits to support employee engagement. On January 1st 2009, he joined Generali Employee Benefits and was appointed Head of the new Pension Unit.



Ian VEITCH

Ian Veitch has been with Zurich since 2008 and is the Global Head of Proposition & Underwriting for the Corporate Life & Pensions business. He is responsible for delivering group pension and group risk solutions to help corporate customers meet their employee benefit needs. A particular focus is on helping multinational customers source global arrangements or provide benefits to their internationally mobile employees.

Prior to joining Zurich, Ian has held a variety of domestic and cross-border roles in the insurance and employee benefits sector in both Ireland and Scotland.

Ian is a Fellow of the Society of Actuaries in Ireland.

Rick WATSON

Rick Watson is Managing Director and Head of Capital Markets at AFME, the Association for Financial Markets in Europe. In this role he leads staff whose member committees include all the main fixed income and equities-related cash products across Europe, AFME's growth-related initiatives, as well as AFME's investor and corporate relationships.

Previously, Mr. Watson held senior securitisation and other investment banking roles at FGIC UK, HSBC, Bear Stearns International, UBS Limited, Morgan Stanley and Freddie Mac. Mr Watson received an MBA from the Fuqua School of Business at Duke University. Since September 2013 he is a member of EIOPA Insurance and Reinsurance Stakeholder Group.



Our Supporters



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1. Source: IPE "Top 400 asset managers" published in June 2016 and based on AUM as at December 2016
2. Amundi figures as of September 30, 2017
3. AFG source, 30 June 2017

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Christian Lemaire, Global Head of Retirement Solutions (christian.lemaire@amundi.com)
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The Generali Employee Benefits (GEB) Network is a strategic unit of the global insurer Generali Group exclusively focused on providing a comprehensive range of employee benefits solutions for corporate clients, including Life, Disability, Accident, Health & Wellbeing, Retirement & Savings, for both local and expatriate employees.

We offer employee benefits plans at local level across our Network, with the capability of consolidating local contracts within international programmes, such as Multinational Pooling, Reinsurance to Captive and Global Underwriting, that enable companies to achieve economies of scale and foster global coordination.

Contact: marketing@geb.com
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Mercer delivers advice and technology-driven solutions that help organizations meet the health, wealth and career needs of a changing workforce. Mercer's more than 22,000 employees are based in 43 countries and the firm operates in over 130 countries.

Mercer is a wholly owned subsidiary of Marsh & McLennan Companies (NYSE: MMC), the leading global professional services firm in the areas of risk, strategy and people. With more than 60,000 colleagues and annual revenue over \$13 billion, through its market-leading companies including Marsh, Guy Carpenter and Oliver Wyman, Marsh & McLennan helps clients navigate an increasingly dynamic and complex environment.

Contact: Jean-François Tondreau, CEO, Mercer Belgium (jean.francois.tondreau@mercer.com)
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- Previnet is an independent service provider delivering administration and IT solutions to the pensions, finance and insurance markets across Europe.
- Previnet has 20+ years of experience in pension scheme administration. A large portion of the overall staff (300+) is dedicated to develop and maintain the 100% in-house software.
- Previnet is administering 220+ pension schemes and 2+ million members. Clients include:
 - IORPs & cross-border schemes: Previnet is actively supporting cross-border pensions. Examples include DC pension arrangements such as RESAVER IORP, NATO DCPS, NESTLE' Middle East. Other projects are still under NDA.
 - International Pension Plans (IPPs). Previnet is currently managing individual pension solutions (QROPS) in Malta.
 - Local Pension Plans: Previnet delivers DC and DB scheme administration on a country by country basis. Italy is the most relevant market.

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STATE STREET GLOBAL ADVISORS

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**Assets under management were \$2.60 trillion as of June 30, 2017. Please note that AUM totals are unaudited.*

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StepStone is a global private markets firm overseeing approximately US\$130 billion of private capital allocations, including over US\$34 billion of assets under management. It has over 310 professionals across fourteen offices in Beijing, Dublin, Hong Kong, La Jolla, London, New York, Perth, San Francisco, São Paulo, Seoul, Sydney, Tokyo, Toronto and Zurich. StepStone Private Debt, with US\$19 billion in capital committed to allocations, leverages the overall Firm's global platform to target privately negotiated debt transactions across corporate, real estate, and infrastructure debt. StepStone's product offering is based on tailor-made investment solutions for institutional clients. These segregated singleclient mandates are complemented by comingled products, which are closed-ended theme specific solutions for small groups of institutional investors.

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Zurich Insurance Group (Zurich) is a leading multi-line insurer that serves its customers in global and local markets. With about 54,000 employees, it provides a wide range of property and casualty, and life insurance products and services in more than 210 countries and territories. Zurich's customers include individuals, small businesses, and mid-sized and large companies, as well as multinational corporations. The Group is headquartered in Zurich, Switzerland, where it was founded in 1872.

Contact: Ian Veitch, Global Head of Proposition & Underwriting (ian.veitch@zurich.com)
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Our Education Partner



The Chartered Alternative Investment Analyst (CAIA) Association, a non-profit organization founded in 2002, is the world leader in alternative investment education. The CAIA Association is best known for the CAIA Charter. Earning the CAIA Charter is the gateway to becoming a member of the CAIA Association, a network of over 8,700 AI leaders located in 90+ countries.

CAIA also offers the Fundamentals of Alternative Investments Certificate Program®, an online course that provides an introduction to alternative investing. CAIA is considered a leading authority on industry trends and developments worldwide.

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