

SOCIETY UPDATE Q3/2023

Dear Members,

We look back on an eventful summer with many highlights and are pleased that so many members participated in the various get togethers across Germany, workshops and lectures. Thank you for your support.

The successful Soft Skills Series with Chris Lemke continues. The presentations and videos are also available in our Content Hub. (See page 4) In addition, please check our [event programming](#) for additional events.

Our German Advocacy members also remain active; many thanks to Martin Hermann, CFA and Peter Nies, CFA, for their comments on the final report of the focus group Private Pension Provision from the federal government (See page 3). Also to Kerstin Baumbach, CFA, and Prof. Dr. Matthias Meitner, CFA, who represented the society at an ESG workshop in Berlin (See page 4).

We are always open to new suggestions and your feedback. Do you have an idea for a speaker or a topic? We would like to hear about it, so please send your suggestion to info@cfa-germany.de

Sincerely,
Susan Spinner, CFA
CEO of CFA Society Germany



UPCOMING EVENTS

16.11. | WEBINAR: THE 3 I'S: INVASION, INFLATION, INTEREST RATES



The Russian war of aggression against Ukraine has now been raging for one and a half years. In addition to immense suffering and destruction, this war has also had a serious impact on the global economy: energy uncertainty and the exacerbation of pre-existing supply chain problems have caused inflation rates to rise dramatically. This development has prompted central banks in many parts of the world to raise their

key interest rates, posing major challenges for companies and households after a decade of extremely low interest rates.

Our expert keynote speaker [Prof. Dr. Andreas Dombret](#) will analyze these wide-reaching impacts and provide an outlook for global economies in this new era.

Details: 17:00-18:15, virtual. [Register on our website.](#)



UPCOMING EVENTS

SAVE THE DATE

07.12. | FRANKFURT | WORKSHOP: NEUROINTELLIGENT LEADERSHIP



What neuroscience teaches us about how to lead ourselves and our team.

Join expert [Dr. Karolien Notebaert, PhD](#), who translates the most recent findings from neuroscience to leadership development trainings, impulse speeches and leadership retreats.

Details: soon on our website.



SAVE THE DATE

UPCOMING EVENTS

05.12. | ONLINE-WORKSHOP: DIGITAL FINANCE

Regulatorische Trends und Entwicklungen

Join expert **Martin Foelsch**, Regierungsdirektor at the Federal Ministry of Finance, for a comprehensive look at the current regulatory landscape of digital finance.

Details: 09:00-13:00, virtual. SAVE THE DATE



UPCOMING EVENTS

SAVE THE DATE

BVH CONFERENCE 2023

On November 14 and 15, 2023, the 31st BVH (Bundesverband der Börsenvereine an deutschen Hochschulen e.V.) conference will take place in Frankfurt.

The Society will again be present with a booth and inform about the CFA Program. We are looking forward to the visit of many candidates and interested students!



CONTENT HUB – WATCH OUR VIDEOS



VIDEO (1 PL credit)

Katherina Duong-Bernet, CFA:
Currency Management in
Times of Global Upheaval



VIDEO (1 PL credit)

Andreas Rätzel, CFA:
ESG und Performance-
messung

UPCOMING EVENTS 2023

27.10. | virtual | CFA WORKSHOP

Christoph Lemke: **Influencing with Style(s).** [SOLD OUT](#)

30.10. | Munich | CASUAL GET-TOGETHER

[Register now](#)

08.11. | Frankfurt | IN-PERSON EVENT

Nico Baum, Matthias Born, Dr. Markus Ebner, Dr. Eric Endress, Martin Hermann, CFA, Dr. Christopher Krauss: **AI in Asset Management – Use Cases and Infrastructure Implementation.** [Register now](#)

09.11. | virtual | CFA WEBINAR

Que Ngyuen, Mahmdou Medhat, Dr. Viorel Roscovan: **Unlocking Investment Insights – A Panel Discussion on Factor Investing Trends.** [Register now](#)

13.11. | Frankfurt | IN-PERSON EVENT

Prof. Dr. Thomas Mayer, CFA: **Zwischen Inflation und Rezession.** [Register now](#)

16.11. | virtual | CFA WEBINAR

Prof. Dr. Dr. h.c. Andreas Dombret: **The 3 I's: Invasion, Inflation, Interest Rates.** [Register now](#)

21.11. | virtual | CFA WEBINAR

Cameron Payseno, CIPM: **Introduction to GIPS** [Register now](#)

22.11. | virtual | CFA WEBINAR

Céline Christensen, Dr. Florian Wedlich, CFA: **Behavioural Risk Management in Practice** [Register now](#)

23.11. | Frankfurt | CFA DINNER

Charter Award Dinner 2023 [Register now](#)

05.12. | virtual | CFA WORKSHOP – SAVE THE DATE

Martin Foelsch: **Digital Finance – Regulatorische Trends und Entwicklungen.**

07.12. | Frankfurt | CFA WORKSHOP – SAVE THE DATE

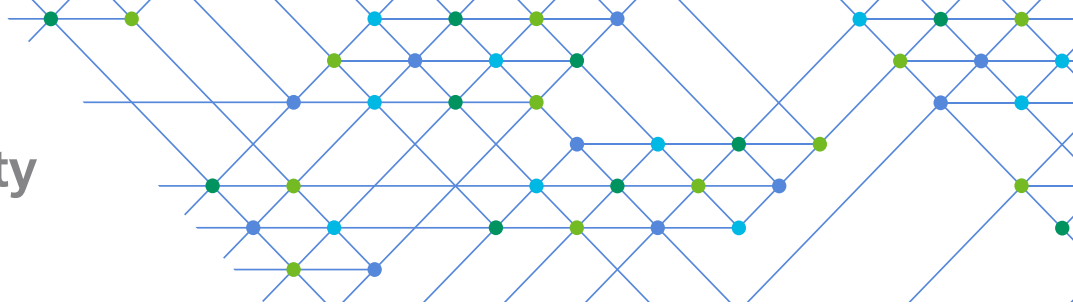
Dr. Karolien Notebaert: **NeuroIntelligent Leadership: What neuroscience teaches us about how to lead ourselves and our team.**

12.12. | virtual | CFA WORKSHOP

Christoph Lemke: **Influencing with Style(s).** [SOLD OUT](#)

13.12. | Cologne | IN-PERSON EVENT

Prof. Dr. Thomas Mayer, CFA: **Zwischen Inflation und Rezession.** [Register now](#)



WORKING GROUPS AND STANDARD SETTING

STATEMENT ON THE FINAL REPORT OF THE FEDERAL GOVERNMENT'S PRIVATE PENSIONS FOCUS GROUP

After the focus group on private pension provision met under the leadership of the Federal Ministry of Finance in the first half of 2023, the final report with the working group's recommendations was published this summer.

Our GAC members Martin Hermann, CFA and Peter Nies, CFA, are experts on the subject of retirement provision and took a closer look at the report. Overall, they see the recommendations of the focus group on private pension provision as positive and as a significant step towards the urgently needed redesign of state-sponsored pension provision in Germany.

[Read their statement on the focus report here.](#)

Martin Hermann, CFA and Peter Nies, CFA, wrote the [Position Paper on Retirement Provision in Germany](#), which was published in June 2022.



CONTINUING EDUCATION

DATA SCIENCE FOR INVESTMENT PROFESSIONALS CERTIFICATE

Understand the application of data science in the investment process and position yourself at the intersection of data scientists, investment professionals and clients.

[Further details on the CFA Institute website.](#)

CERTIFICATE IN ESG INVESTING

Being able to incorporate environmental, social, and governance (ESG) factors into investment decisions is becoming an increasingly important skill for anyone working in the investment industry.

[Further details on the CFA Institute website.](#)



VERKEHRTE (FINANZ)WELT

WirtschaftsWoche

10.10.23 | Bernhard Grünäugl, CFA:
EU-Nachhaltigkeitsziele: Die Tücken der Taxonomie
[... read article](#)

26.09.23 | Amine Errami, CFA:
Geopolitik: Die bekannteste Unbekannte in der Geldanlage
[... read article](#)

12.09.23 | Maria Vogt, CFA:
Gute Perspektiven für aktiv gemanagte Bondportfolios
[... read article](#)

29.08.23 | Christian Schwab, CFA:
Wandelt China auf dem japanischen Weg? [... read article](#)

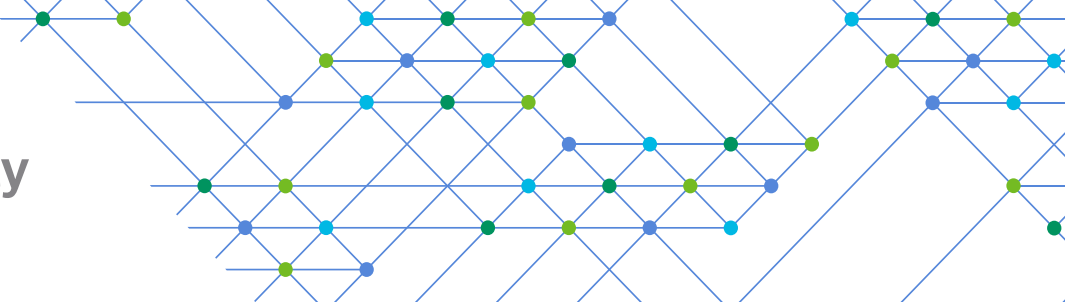
15.08.23 | Roland Ullrich, CFA:
Ist die Börse ein Casino und Geldanlage nur ein Glücksspiel?
[... read article](#)

01.08.23 | Peter Jakobus, CFA:
Jetzt sortieren vermögende Anleger ihre Portfolios neu
[... read article](#)

18.07.23 | Dr. Florian Wedlich, CFA, und Dr. Martin Saueremann, CFA:
Behavioural Finance: So beeinflussen unsere Emotionen das Anlageverhalten [... read article](#)

04.07.23 | Martina Bahl, CFA:
Die Achterbahnfahrt der Zinsen wird sich bald beruhigen [... read article](#)

20.06.23 | Thomas Altmann, CFA:
Japanischer Nikkei 225: Was Anleger vor einem Investment wissen sollten [... read article](#)



PAST EVENTS

ESG WORKSHOP IN BERLIN

On September 26, our GAC members Kerstin Baumbach, CFA, and Prof. Dr. Matthias Meitner, CFA, were invited to speak at a workshop from PECan Research in Berlin. With their assessments of climate disclosure and green financial policy, they enriched the discussion on the topic of "Climate finance, financial regulation and the political economy: Steering the green transition".



PAST EVENTS

SOFT SKILLS SERIES WITH CHRIS LEMKE

[Christoph Lemke](#) has already been working successfully with the Society over many years and continues to provide high quality programming.

Not able to participate in the workshops of Chris Lemke? Just watch the videos or download the [presentations](#) in our Content Hub.



PAST EVENT

MARG FRANKLIN'S VISIT IN FRANKFURT

In August, Marg Franklin, CFA, CEO and President of the CFA Institute, visited Frankfurt to meet with Christine Lagarde, President of the European Central Bank.

Beforehand, she visited our Society office and talked at length with our CEO and the office team.



Video Workshop 1

High impact presentations made simple



Video Workshop 2

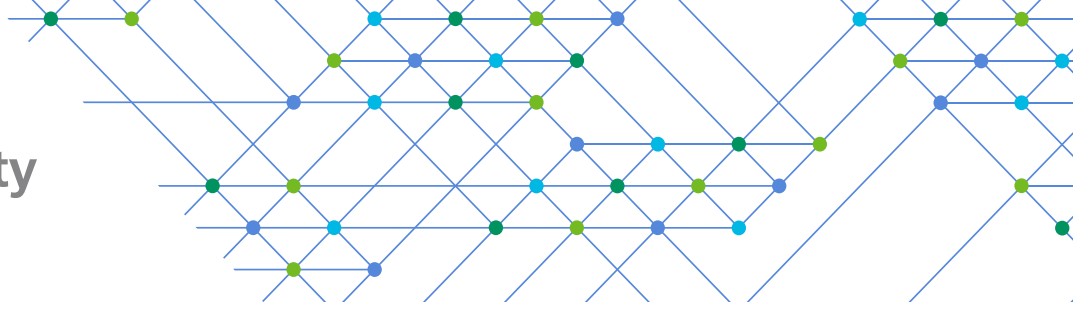
Assertiveness: Stand your ground without being aggressive or submissive



You missed an event?

**JUST VISIT OUR
CONTENT HUB**





PAST EVENTS

CFA LECTURE IN HAMBURG

On July 6, ESG manager Dr. Julian Hochscherf was a guest in Hamburg. In his presentation "Principal Adverse Indicators and SFDR reporting templates: Is that it or is there more to come?" he explored, among other things, the question of whether these disclosures can be used to counter accusations of greenwashing. Many thanks for the interesting insights and the subsequent exchange.

[You can download the presentation here.](#)



PAST EVENTS

CFA LECTURE IN MUNICH

On July 25, our CFA members met at Munich Re and enjoyed an insightful lecture by Nicholas Gartside, CFA. His presentation, „When TINA meets TARA – A Tale of Transformation,“ addressed how we can leave TINA (There Is No Alternative) behind and find real alternatives in the changing investment landscape.

[You can download the presentation here.](#)



PAST EVENTS

CFA INSTITUTE RESEARCH CHALLENGE: KICK OFF CALL

On October 11, we launched the 14th instalment of the CFA Institute Research Challenge. A total of nine student teams from German universities are participating in this year's competition. On November 7, the company presentation will take place, where the subject company **Lufthansa Group** will introduce itself to the teams.

Lufthansa Group will provide the students with information about the company's financials and answer specific questions the teams may have. After that, each group will work on a research report and valuation, based on the information provided and publicly available data. To help the teams out, we have recruited dedicated volunteer experts among the CFA Society Germany membership, who will act as Industry Mentors. Many thanks to all members involved!

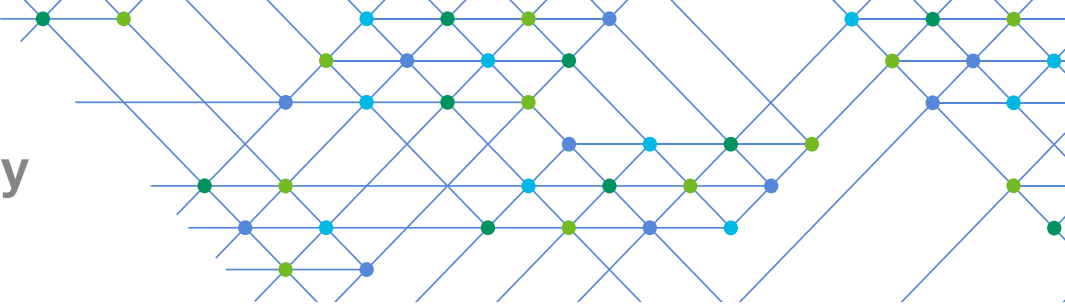


PAST EVENTS

WOMEN'S FINANCIAL CLUB IN WARSAW

At the invitation of the CFA Society Poland, our CEO Susan Spinner, CFA presented to over 200 participants at the Stock Exchange in Warsaw on experiences in her long career in finance, her focus on Ethics, especially currently the topic of AI Ethics in finance.





PAST EVENTS

SUMMER ROOFTOP RECEPTION IN FRANKFURT

This year's Rooftop Reception in Frankfurt took place at the end of June. In total, more than 80 members and key stakeholders gathered on the roof terrace of our office on a warm summer evening. Our CEO Susan Spinner, CFA and our Supervisory Board member Prof. Dr. Thomas Mayer, CFA welcomed the guests. CFA Institute Presidents Council Representative Pieter van Putten, CFA, also gave a short speech.

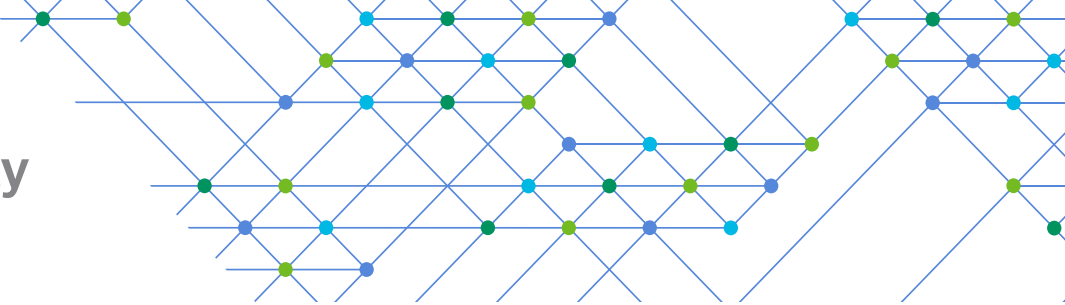


PAST EVENTS

VESPER PARTY IN MUNICH

Celebrate the Munich way. On a beautiful summer evening at the end of June, our Munich Vesper Party took place. Numerous CFA members from Munich and the surrounding area came together at the Augustiner for this special get together. And of course, there was also a keg tapping. It was an evening filled with great conversations, networking, and a delightful ambiance.





PAST EVENTS

GET TOGETHERS IN MUNICH, FRANKFURT & HAMBURG



PAST EVENTS

HAPPY HOUR AT DELOITTE IN FRANKFURT

In September a fantastic Summer Happy Hour in cooperation with Deloitte took place in Frankfurt. Thanks to all who joined us! And a special thanks to Deloitte, for their amazing support.



SOCIAL MEDIA

STAY CONNECTED

Follow CFA Society Germany on social media to keep up-to-date with our latest activities, news, and events and benefit from a range of useful information. We'd love you to give us a follow and connect with us! You can catch us on [LinkedIn](#) and [X](#). Make sure to mention us in your post-ings!

We also invite you to join our [CFA Society Germany | Members Group](#) as well as our [CFA Society Germany | Candidates Group](#) on LinkedIn! This group serves as a platform for our Society members to share experiences and knowledge, provide insights, ask for advice and build valuable contacts within the CFA Germany network.