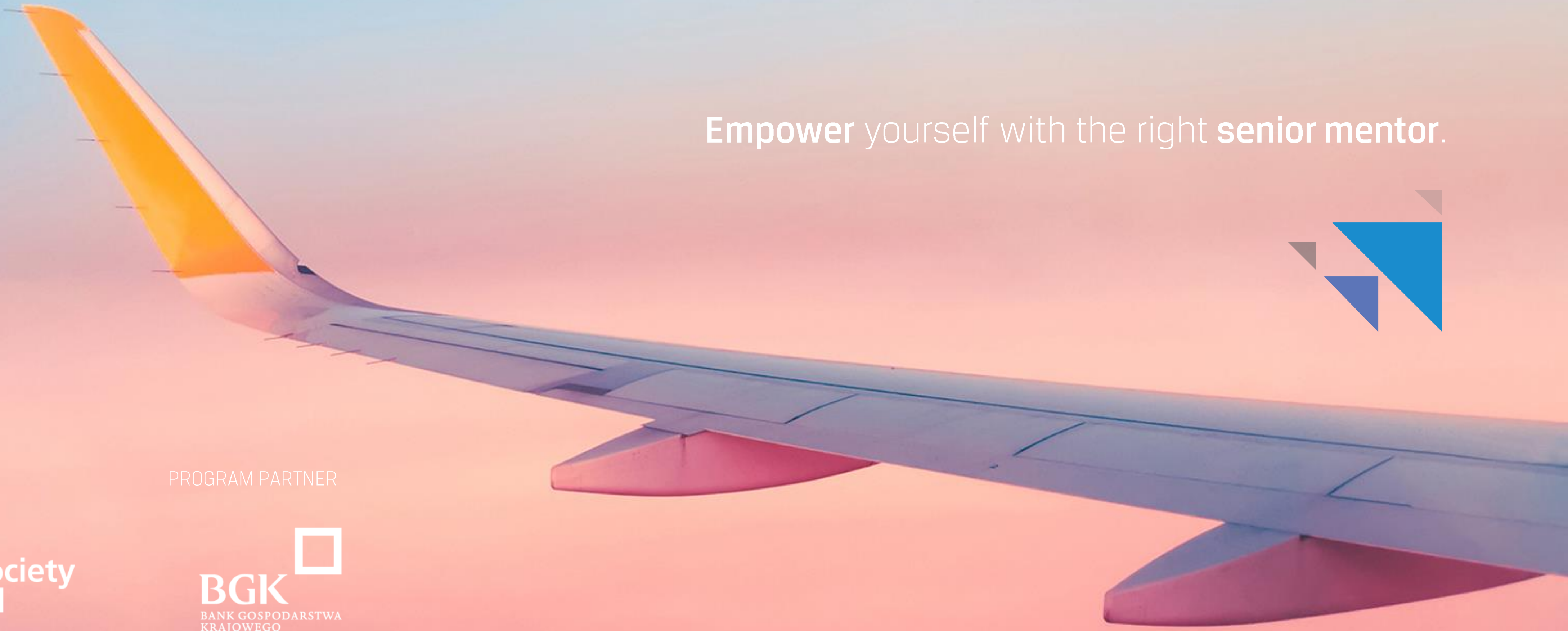
Master Your **Career**.
Start TO BE MORE.

Empower yourself with the right **senior mentor**.



ORGANIZER

CFA Society Poland

PROGRAM PARTNER

BGK
BANK GOSPODARSTWA KRAJOWEGO

ORGANIZER

PROGRAM PARTNER

PRZEMYSŁAW BARANKIEWICZ, CFA

Vice President, CFA Society Poland
Branch Director (Poland), Finax

Head of Slovak robo-advisor Finax for Poland. Vice President of the CFA Society Poland, an association of more than 680 people with the investment CFA® title. Economic commentator, and in the past, among others, Editor-in-Chief of Bankier.pl and the online version of "Puls Biznesu". Author of the zByka.pl blog and founder of invESGo.pl, a portal dedicated to good investing, or ESG.

MONIKA BĄCZYŃSKA, CFA

Head of Financial Resources Management Department
mBank

Monika Bączyńska, CFA has 20 years of experience in the banking industry and in finance. Currently, she heads Financial Resources Management Department at mBank, being in charge of 1st line of defence for IRRBB, capital and long-term funding management. Over the years, she was working in different areas, being in charge of business controlling, risk measurement and risk management. Monika is a top-rated speaker at international conferences and a highly valued trainer. She also participates in mentoring programs. Monika is a CFA charterholder and Professional Risk Manager (PRM). As for pro bono activities, Monika was a Board Member at mFundacja. Currently is a Board Member of the ALM Committee at the Polish Bank Association and Ambassador of EWOB (European Women on Boards). Her goal is to combine high-level expertise and performance with team management and people's development. Monika's hobbies are travelling, trekking (conquered e.g. Kilimanjaro, Kala Pattar, Everest BC), biking, and behavioural economics.

CFA Society Poland

ORGANIZER

BGK
BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

ROBERT BOHYNIK, CFA

Deputy CEO and Chief Investment Officer
NN Investment Partners TFI

He started his career in 2001. He holds a PhD in Finance Management. Since 2006 he has been the CFA charterholder and since 2011 the CAIA title holder. Initially he worked as a Financial Analyst and Portfolio Manager. In 2005, he joined the Allianz Pension Fund Management Company as a Fund Manager. In 2007 he was promoted to Senior Portfolio Manager at Allianz Asset Management (Slovakia), where he managed the portfolios. He joined ING Group in 2008 at ING Investment Management in the Czech Republic as Chief Investment Officer, responsible for portfolio management for institutional clients. He also held the position of CEO at ING Investment Management in the Czech Republic. From 2 October 2012 until 8 December 2014 he was a Member of the Management Board of ING IM (Poland). Since October 2, 2012 till July 15, 2020 a member of the Management Board of NN Investment Partners TFI S.A. (formerly ING TFI S.A.) responsible for the Investment Department. Since July 15, 2020, Deputy CEO of NN Investment Partners TFI.

ORGANIZER

PROGRAM PARTNER

JAROSŁAW DOMINIAK

President

Stowarzyszenie Inwestorów Indywidualnych

Initiator and the first president of Stowarzyszenie Inwestorów Indywidualnych.. Since 2000 scholarship holder and a member of the Ashoka – Innovators for the Public organization. He specializes in investors' clubs and financial communication. Since 2000 a representative of the national investors' organizations at the World Federation of Investors Corp. Member of many sectoral groups and consultation councils established by the Minister of Finance and Minister of State Treasury (among others Financial Market Development Council, Warsaw Stock Exchange Privatisation Council, Citizen Shareholding Council at the Minister of State Treasury). Member of the consultation team established as part of the works on the draft of the Code of Corporate Governance at Polskie Forum Corporate Governance. Jury member during a competition for the best Internet site of a stock exchange listed company. Chapter member during a competition for the best annual financial statements of a stock exchange listed company. Since 2007 a judge in the Stock Exchange Court at the Warsaw Stock Exchange. In the years 2009-2011 a member of the management board of the Euroshareholders organization. Since 2011 a member of the permanent advisory group (Securities and Markets Stakeholder Group) at ESMA-European Securities and Markets Authority in Paris. Member of supervisory boards of publicly held companies (currently member of the Supervisory Board of DGA SA, and a member of the audit committee of the Supervisory Boards of DGA SA, IMS SA).

ORGANIZER

PROGRAM PARTNER

AHMED ABOU EL SAAD, CFA

Managing Director, Azimut Egypt Asset Management
President, CFA Society Egypt

Ahmed Abou El Saad is the Managing Director of Azimut Egypt Asset Management managing a total AUM of EGP 10 billion in a wide range of institutional/HNW portfolios as well as public equity and money market funds. Azimut Egypt is Part of Azimut Group, which is a Global Asset Management firm with total of USD 100 billion over 17 countries worldwide. Ahmed was the head of asset management at Naeem Holding. He was the Head of Capital Markets at MIBank, where he managed the bank's investment portfolio in public trading equities, fixed income instruments and private equity. He has also served as the head of surveillance at the Cairo and Alexandria Stock Exchange, where he was on the executive committee that works on introducing new instruments and regulations to the market. Ahmed is currently a board member at the Egyptian Stock Exchange. He is also the President of CFA Society Egypt & the Secretary General of the Egyptian Investment Management Association. In SSM Cairo, Mr. Abou El Saad will provide master classes and courses in Investment. Ahmed holds a Bachelor of Arts from Alexandria University, an MBA from AASTMT. Ahmed is also a Chartered Financial Analyst (CFA) and certified the professional certificate in project finance and investment appraisal from the Harvard Institute for International Development.

ORGANIZER

PROGRAM PARTNER

LUDMIŁA FALAK-CYNIAK, CFA

President

Aegon PTE

Ludmiła Falak-Cyniak, CFA, CEO of Aegon PTE, has been involved in the capital market since 1998. She graduated from the University of Lodz with a degree in Banking, as well as from the Postgraduate Study of Investments and a PhD program at SGH Warsaw School of Economics. She holds a license as an investment advisor, stockbroker and holds the titles of Chartered Financial Analyst® (CFA®) and Professional Risk Manager (PRM). He is a member of the CFA Instituite, Professional Risk Managers' International Association and the CFA Society Poland. From 2005 to 2011, as Investment Director of KBC TFI , she was responsible for the investment area, while also serving as a Board Member. From 2011 to 2013, she was a Board Member and Investment Director at Skarbiec TFI. From 2013 to 2017 at Amundi Polska TFI S.A., she participated in the establishment of the company, served as Investment Director and sat on its Board of Directors.

ORGANIZER

PROGRAM PARTNER

PAWEŁ HOMIŃSKI, CFA

President

Noble Funds TFI

Graduate of the Cracow University of Economics. He is a CFA charterholder and also holds Polish investment advisor and stockbroker licences. He has been involved in the financial market for over 25 years. He started his professional career at the age of 20 at Magnus Brokerage House, later he worked for East Capital Beteiligungen AG fund, and then from 1999 at PTE DOM, where he managed the pension fund's equity portfolio. He currently serves as CEO of Noble Funds TFI, a company with which he has been involved since its inception in 2006. During this time, he has held the positions of a fund manager, head of the fund management, CIO and, finally, CEO.

CFA Society Poland

ORGANIZER

BGK BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

KRZYSZTOF KAMIŃSKI, CFA
Board Member
Millennium TFI

Experienced high-level manager in the financial sector, mostly in the areas of capital markets, mutual funds and asset management. Member of CFA Institute since 2009, since 2012 CFA charterholder. licensed investment advisor (nr 819). In the years 2007–2013 worked for HSBC Global Asset Management developing the distribution of global mutual funds of HSBC in Poland Since 2013 r. has been working as a Board Member of Millennium TFI S.A. supervising areas of asset management, sales, marketing, communication and being responsible for strategic projects of the TFI.

ORGANIZER

PROGRAM PARTNER

ŁUKASZ KĘDZIOR

President

Pekao TFI

Łukasz Kędzior is the President of the Pekao TFI Management Board (CEO), connected with the Polish financial market for almost 20 years. He is one of the best managers in the asset management business, a high-class expert who gained experience in sales of investment products. Over the period 2017–2021, he worked for PZU TFI as Managing Director, responsible for the creation and implementation of strategic goals related to investment products. He represented the company in dealing with distributors and brokers. Previously in the years 2014–2017, he was a member of the Management Board (CSO) at Skarbiec TFI, where he was responsible for long-term strategies and managing the sales area, sales support and marketing. From 2012 to 2014 he worked as Sales Department Director at PZU TFI. The main goal was to create external distribution channels, especially connected with banks and brokerage houses, as well as supervision of overall sales activities. In 2011 he worked for Skarbiec TFI as director of the Prestige Clients' Department. Before he had also worked at Pekao Brokerage House. He graduated from Krakow University of Economics with a specialisation in accounting. He completed postgraduate studies at WSB National Louis University in Nowy Sącz where he specialised in the management of companies and also completed PhD Studies at Krakow University of Economics. He also has two MBA titles in International Finance and International Marketing. Currently, he is a member of the Chamber Board at the Chamber of Fund and Asset Management.

ORGANIZATOR

PARTNER PROGRAMU

PIOTR KUBA, CFA

Member of the Management Board responsible for Investments
PFR TFI

Graduate of the University of Łódź, faculty of Mathematics, field of Numerical Methods and Programming. He has an Investment Advisor licence and the title of Chartered Financial Analyst® (CFA®) awarded by the CFA Institute in the USA. He was a participant of the manager development programme, Management, organised by ICAN Institute and Harvard Business School. Piotr Kuba has more than 20 years of experience on the capital market in the area of the management of funds and assets, including 18 years of experience in investment fund associations. In 1998-2016 he was associated with the Skarbiec group, where he worked as a fund manager in Skarbiec TFI, Equity Fund Management Department Director, and Controlling Department Director. Since 2004 he has worked on the Management Board of Skarbiec TFI where, as the Member of the Management Board and then its Vice-President, he was responsible for the management of the capital and private market funds, including real properties, product area and development strategy, as well as risk control. In 2002-2012 he was also a member of the Supervisory Board at ProService AT. At PFR TFI S.A. he is responsible for the investment area.

ORGANIZER

PROGRAM PARTNER

KATARZYNA MAJCHRZAK

Business & Operations Director
Franklin Templeton International Services

Manager with over 20 years of professional experience in the financial industry. Since August 2022 Business & Operations Director within Franklin Templeton International Services located in Luxembourg, responsible for business administration and planning activities of the Franklin Templeton European UCITS Management Company, supporting governance activities, EMEA strategic initiatives and local Luxembourg industry engagements. Katarzyna Majchrzak is also a Board Member of Franklin Templeton Investments Poland, one of the 3 shared services companies of Franklin Templeton globally. Previously. Katarzyna Majchrzak has been acting as a Senior Corporate Counsel covering Switzerland, Lichtenstein, Nordics, Poland, Slovakia, Czech Republic, Hungary, Baltics and Netherlands from a legal perspective. From 2017–2022 a Board Member of Templeton Asset Management Poland TFI, being also an IZFiA Board Member for a couple of years. Expert for cross-border financial law issues including set-up and cross-border distribution of UCITS, AIFM, MiFID products, cross-border investment management and trading, as well as other financial law matters. Experienced with Luxemburgish, Irish and Cayman Islands products distributed cross-border in EU and outside of EU. Extensive experience in start-up operations, M&A, legal and operational processes within the financial institutions, especially registration of products for distribution, portfolio management and IMA, trading, compliance, corporate governance and operational risk, back & middle office including settlement processes, transfer agent and custody activities. Successfully set up several regulated financial institutions (MiFID investment firm, UCITS ManCo and Lux ManCo branches). Katarzyna Majchrzak is a lawyer, and a postgraduate in European Banking Law on PAN, she holds an MBA from the University of Warsaw, CMT. Katarzyna Majchrzak is a strong advocate of diversity and inclusion initiatives.

CFA Society Poland

ORGANIZER

BGK BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

Ewa Małyszko
President
PFR TFI

Manager with rich experience in managing financial institutions. She has run such institutions as PKO BP Bankowy PTE, KGHM TFI, SEB TFI. Co-author of Employee Capital Plans (pol. Pracownicze Plany Kapitałowe) project. She actively promotes long-term saving, financial education and new technologies in the finance sector. Economist and graduate of the Postgraduate Studies in Pension Fund Management and Postgraduate Studies in quantitative methods in the analysis of financial markets at the Warsaw School of Economics. She has also completed the prestigious Program for Executive Development for senior management at the IMD Institute in Lausanne and the organization management program at the Wallenberg Institute in Sweden. Member of the EFPA Poland Foundation Council, acting for financial advisory standards and an EFPA Poland Representative in Standards and Qualifications Committee EFPA.

WALDEMAR MARKIEWICZ
President
The Polish Chamber of Brokerage Houses

He has strongly advocated for developing the Polish capital market for more than 20 years. He has extensive career experience. He served in the capacity of the President of the Management Board of Deutsche Bank Securities from 1999 to 2018 where he was responsible for the brokerage house's operations in Central European markets (Warsaw, Budapest, Prague) and he was the President of the Management Board of Santander Securities S.A. in 2018 and 2019. Previously, he worked for Scotia Bank in Canada and obtained a license to advise and intermediate in transactions on the regulated capital market. He has been the President of the Management Board of IDM since 2012. Supervisory Board Chairman of IDM in 2011 and 2012, Management Board Member of IDM from 1997 to 2010. In 2001 and 2002 he was a member of the Supervisory Board of the Warsaw Stock Exchange as a representative of the brokerage houses. At the initiative of Waldemar Markiewicz, IDM kicked off a public debate on the necessity of devising a governmental strategy for the capital market, which led to the current implementation of the government's Capital Market Growth Strategy. Graduate of the Foreign Trade Faculty at the Main School of Planning and Statistics (currently Warsaw School of Economics), master's degree in economics.

CFA Society Poland

ORGANIZER

BGK
BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

OLIVIER P. MÜLLER, CFA

Board Member
CFA Society Switzerland

Olivier P. Müller has more than 18 years of financial services industry experience, and also broad leadership experience. He holds a Master of Science in Business and Economics, has been a CFA charterholder since 2006, and is a CAIA charterholder as well as FRM charterholder. Oli has been with Credit Suisse since 2002 in many roles, including portfolio management, trading research, equity and credit research, and investment strategy and most lately he was Head of Investment Delivery, working on advisory and discretionary solutions as well as investment communication. He has been a volunteer since 2009 with CFA Society Switzerland and CFA Institute, working with two colleagues on the CFA Institute Research Challenge and University Relations, as well as on smaller assignments. He is a Swiss citizen, lives in the city of Zürich, and speaks German and French, both native, as well as English.

CFA Society Poland

ORGANIZER

BGK BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

REMIGIUSZ NAWRAT, CFA

Vice President

PKO TFI

Graduate of the Warsaw School of Economics and MBA studies at George Washington University in Washington – Chartered Financial Analyst® (CFA®). His professional career began in 1998 at the Ministry of Finance. From 2001–2003 he worked for the National Bank of Poland, from 2002 as Deputy Head of the International Comparative Studies Department in the Foreign Department. From 2003 to 2007 he was an Advisor to the Executive Director of the World Bank in Washington DC. Since 2007 he has been connected with the capital market in Poland. In 2007-2008 he worked as a share analyst in PZU Asset Management. Since 2008 associated with PKO TFI. Initially as Director of the Development Department, and since 2009 – as the Managing Director of the Asset Management Division. Since 2012 Member/Vice-President of the Management Board of PKO TFI.

CFA Society Poland

ORGANIZER

BGK
BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

PAWEŁ NIERADA

First Vice President
BGK (the Polish Development Bank)

Paweł Nierada graduated from the Warsaw University of Economics (Finance and Banking) and holds an MBA from the Carlson School of Management at the University of Minnesota. He has participated in numerous professional courses on venture capital, corporate finance, M&A and capital markets. He has extensive experience in the fields of investment banking and capital markets. He has executed numerous projects in Poland and abroad in the fields of public and private markets (IPOs, bond and equity issues, market analysis), mergers and acquisitions, strategic consulting for large companies, and privatisation advisory (for the Ministry of State Treasury and investors). He began his career in the mid-1990s, working for leading financial institutions and consulting firms such as ING, Credit Suisse First Boston, NM Rothschild, Deloitte and ERSTE Bank Group, where he reached management positions. He currently supervises BGK's Capital Markets, Treasury and Investment, International Relations, Economic Research and Financial Reporting and Accounting divisions. He has spoken at numerous conferences in Poland and abroad and comments in the media on capital markets and the fuel and energy sectors. He holds the status of Approved Person accredited by the UK Financial Conduct Authority (FCA).

IZABELA OLSZEWSKA

Board Member
Warsaw Stock Exchange (GPW/WSE)

Izabela Olszewska holds a degree from the Department of Finance and Statistics, Warsaw School of Economics, and has completed the PhD study programme at the Department of Economic Sciences, University of Warsaw. She attended the International Institute for Securities Market Development programme offered by the US Securities and Exchange Commission. She has worked in the capital market since 1992, initially as an analyst at Bank Handlowy's Capital Operations Centre and since 1999 with the Warsaw Stock Exchange (GPW). Izabela has held a number of business and sales management functions at GPW, working with investors and companies, both local and international, and was responsible for the development of the product offering in the regulated and alternative markets. Previous to her Board appointment, she was Managing Director for Market Development. Izabela has been Chair of the Supervisory Board of Towarowa Giełda Energii (Polish Power Exchange) since July 2019 and was a Member of the Supervisory Board of Bondspot from October 2015 to June 2019. Previously, she was a Member of the Board of Directors of Aquis Exchange, London. She is a Member of the Advisory Board of Krajowy Depozyt Papierów Wartościowych (Central Securities Depository of Poland).

CFA Society Poland

ORGANIZER

BGK
BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

BARTOSZ PAWŁOWSKI, CFA

Chief Investment Officer, mBank Private Banking
Vice President, CFA Society Poland

Bartosz Pawlowski, CFA is the Chief Investment Officer of mBank Private Banking where he focuses on asset allocation for both discretionary asset management and investment advisory. Previously he spent almost 10 years in London, initially as Global Head of Emerging Markets Strategy at BNP Paribas and then as a Portfolio Manager at Finisterre Capital, an EM-oriented macro hedge fund. Bartosz holds M.A. in Economics from SGH Warsaw School of Economics and is a CFA Charterholder. He is also Vice President of the Board of CFA Society Poland.

ORGANIZER

PROGRAM PARTNER

MARCIN PETRYKOWSKI

President

Atende Group

Marcin Petrykowski brings over 20 years of business experience, where he managed strategic development and operational activities of global capital market institutions. Currently, he serves as CEO and President of the Management Board for Atende, a leading Warsaw Stock Exchange (WSE) listed technology group. In parallel he acts as an Senior Advisor to Vauban Infrastructure Partners, an innovative international investment fund, supporting its Central and Eastern Europe (CEE) strategy. Considered a leading voice of the digital, technology, new economy and capital markets space in Poland and CEE region with regular outreach, insights and contribution to top-tier events, media and forums. Previously associated with S&P Global (previously: Standard & Poor's) where he managed business operations across the Europe, Middle East and Africa (EMEA) region. As Managing Director at S&P Global Ratings, he introduced the company to Poland and CEE, and transformed the EMEA commercial organization into a new operating model. Prior to joining S&P, he was Executive Director at J.P. Morgan Corporate and Investment Bank in London, responsible for the German, Russian and CEE markets, simultaneously acting as Deputy General Director for J.P. Morgan in Poland. He began his career with Citi corporate banking in Warsaw. Holds extensive experience in the field of digital economy and technology: he performed a supervisory function for MCI Capital SA, a WSE listed pan-European private equity fund, currently is a Fintech lecturer at the University of Warsaw as well as Chairman of the Program Board for the Fintech & Insurtech Digital CEE conference. Pro bono acts as Chairman of the Advisory Board at the Lesław A. Paga foundation, in the past having long-term served as a member of the Board of Directors at the American Chamber of Commerce in Poland (AmCham). A graduate of the Leadership Academy for Poland program, Kozminski University, Lund School of Economics and Management, and postgraduate studies at the University of Warsaw.

ORGANIZER

PROGRAM PARTNER

MARKUS POSCHER, CFA

Head of Austria & CEE Distribution
Invesco

Markus Poscher is heading Invesco's distribution efforts in Austria and Central Europe. Before joining Invesco in 2005, he worked in the equity research department of Credit Lyonnais Securities in Paris. Markus holds a Master in Business Administration from the University of Linz. A CFA charterholder from 2008 on, he has also accepted to serve at the board of CFA Society Austria since 2017.

ORGANIZER

PROGRAM PARTNER

PIOTR PRAŻMO

Board Member/CFO, Erste Securities Polska
Chairman of the Supervisory Board, The Polish Chamber of Brokerage Houses

Graduate of the Warsaw University of Technology, Faculty of Technical Physics and Applied Mathematics, major: Information Technology. In 1997, he completed an MBA study at the Warsaw University of Technology Business School (a joint venture of the Warsaw University of Technology, London Business School, HEC School of Management Paris and Norwegian School of Economics and Business Administration), and in 2021 he completed postgraduate studies in Business.AI: Technology, Law, Application of Artificial Intelligence at Koźmiński University in Warsaw. Member of the Association of Chartered Certified Accountants (ACCA), with the FCCA title. In 1997–2007 with Deloitte Audyt of Financial Institutions Audit Department, including 2003-2005 at Deloitte & Touche LLP in New York. Since September 2007, Member of the Management Board and CFO responsible for Finance & Operations, IT, as well as Risk and Compliance with Erste Securities Polska.. Since 2011, Member of the Supervisory Board and since June 2014 Chairman of the Supervisory Board of the Polish Chamber of Securities Brokers (IDM). In the years 2011-2014, he cooperated with the Accounting and Taxation Institute as a member of the jury of „The Best Annual Report" contest. In 2017-2022, Chairman of the Program Board of the Annual Conference of the Chamber of Brokerage Houses. From 2017 to 2020, he was an Independent Member of the Exchange Supervisory Board of the Warsaw Stock Exchange (GPW), serving as Secretary of the Exchange Board and Chairman of the Audit Committee, and was also a member of the Remuneration and Nomination Committee and the Regulation and Corporate Governance Committee.

ORGANIZER

PROGRAM PARTNER

TOMASZ PRUSEK

President

The Friendly State Foundation

The President of the Friendly State Foundation (Fundacja Przyjazny Kraj), journalist, and former deputy business editor in „Gazeta Wyborcza" and wyborcza.biz, where he covered the area of financial market: stocks, bonds and corporate governance. In 2011 he received the Journalist of the Year 2011 Prize form the Polish Association of Individual Investors. Besides, he received an honourable mention in the competition: "The Directions of the Polish economy by 2005" (1996), the Eugeniusz Kwiatkowski Award by the Krakow Academy of Economics (1997), "Sharp Pen" by Business Centre Club (2000), "Citigroup Journalistic Excellence Award" (2004), Award "FERK" (2004). In 2004 he received the Special Award in the contest for investigative journalists called "Only Fish Don't Take Bait?", organized by The Stefan Batory Foundation (2004). He was also nominated for the Grand Press Journalist Prize (2003, 2012) and awarded an honourable mention by the Polish Journalists Association (2007). Tomasz Prusek published the novels „K.I.S.S." (2014) and „P.I.I.G.S." (2019), showing the dark side of the capital market. He is a co-author of following books: "Regulowany rynek kapitałowy w Polsce. Początki" (eng. „Regulated capital market in Poland. Beginnings") and „Raport roczny spółki publicznej" (eng. „Annual report of a public company").

ORGANIZER

PROGRAM PARTNER

MIHAI PURCAREA, CFA
CEO
BRD Asset Management

Mihai Purcarea, CFA is an experienced investment professional who was involved in managing some of the largest investment funds in the CEE region in the past 15 years. He currently holds the position of CEO at BRD Asset Management and was previously chief investment officer at Erste Asset Management Romania. He is also a board member of CFA Society Romania and the Fund Managers Associations of Romania.

ORGANIZER

PROGRAM PARTNER

PIETER VAN PUTTEN, CFA

Director/COO

Ahlstrom Invest

Pieter van Putten, CFA is the Director and Chief Operating Officer of Ahlstrom Invest, an Amsterdam, Netherlands-based family offices representing a Finnish industrial family. Responsibilities include management of day-to-day operations, and business development and as a member of the investment committee, Pieter contributes to the investment decision process. He started his career in 1989 in the institutional asset management division of Commerzbank in Frankfurt. From 1993 he built the asset management operations for the bank in Asia-ex-Japan, first from Hong Kong and later from Singapore. In 2002 he became CEO of Aviva-owned Morley Fund Management (Singapore) and from 2003 to 2008 he was managing director for Singapore-based China equity specialist APS Asset Management. After his return to the Netherlands Pieter carried out consultancy work, among others for hedge fund manager Pelargos Capital, which he helped with a range of operational projects, and subsequently joined Pelargos Capital as managing director. Pieter graduated in 1988 with a double MBA degree from Nijenrode University in the Netherlands and University of Florida in Gainesville, United States. Pieter has been a CFA charterholder since 1998, and he is a Fulbright scholar. As Presidents' Council Representative Pieter holds a senior volunteer position within CFA Institute. For FY 2023 Pieter is the PCR Vice Chair.

ORGANIZER

PROGRAM PARTNER

MAŁGORZATA RUSEWICZ
President, IZFiA
President, IGTE

A lawyer by education, she also completed post-graduate studies in insurance at the Warsaw School of Economics. In 2013, she was appointed President of the Pension Fund Management Company Chamber, but she has been involved in insurance since the beginning of her professional career, which began in 2002 at the Social Insurance Institution (ZUS). In the following years, she cooperated with the Institute of Labor and Social Affairs and the European Commission as an expert in the labor market and insurance law. In 2005-2007, she was associated with the University of Ghent, participating in the Training and Reporting on European Social Security program. In 2007-2012, she served as Director of the Social Dialog and Labor Relations Department and Coordinator of the Labor Market Council at the Lewiatan Confederation. She has authored a number of publications on insurance law and the labor market.

CFA Society Poland

ORGANIZER

BGK
BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

BEATA SAX, CFA

Vice President, Investors TFI
Vice President, IZFiA

Graduate of the Warsaw School of Economics (Finance and Banking) and University College Dublin (MEconSci in European Economics and Public Affairs). She spent 2002-2003 in Germany on a Robert Bosch Foundation stipend for young leaders from Central Europe. Holds the title of Chartered Financial Analyst® (CFA®). She has worked in the Polish financial market since 2000, first at the Securities and Exchange Commission (now the KNF) and next at the Ministry of Finance (2003-2007), where she rose to the post of Deputy Director of the Department for Capital Market Development (in charge of the Capital Market Section). She has been with Investors since 2007 since 2009 as Vice President / COO of Investors TFI. Active in the Polish Chamber Asset Managing Companies (IZFiA) as a Board Member since 2020, and as Deputy Chair of the Board since 2022.

CFA Society Poland

ORGANIZER

BGK BANK GOSPODARSTWA KRAJOWEGO

PROGRAM PARTNER

ANDRZEJ STEC

Editor-in-Chief
"Parkiet"

Editor-in-chief at „Parkiet" (since 2012), the oldest economic daily in Poland and Depute Editor-in-chief at „Rzeczpospolita" (since 2016). He manages the largest economic newsroom in Poland. Earlier: an economic journalist at „Gazeta Wyborcza", an editor at „Puls Biznesu" (financial desk), and a stockbroker at brokerage house: BM BPH in Cracow. He has been interested in the financial and capital market since 1993.

ORGANIZER

PROGRAM PARTNER

AGNIESZKA SURMACKA

Business Advisor
Former President
PKO Finat

Graduated from the Department of Law and Administration of the Nicolaus Copernicus University in Toruń and the Executive MBA programme conducted by the Gdansk Foundation for Management Development (GFKM) in cooperation with Rotterdam School of Management, Erasmus University. She is a holder of the attorney-at-law certificate. She is a member of the Warsaw Bar Association. In 2022 she completed postgraduate studies in Psychology for Managers conducted by Kozminski University. For over 20 years she has been professionally involved in the financial market. She started her career in the financial market at PTE "DOM" , where she participated, inter alia, in work for launching the activity of a general pension fund company. At that time, she actively participated in the work of the Chamber of Commerce Retirement Associations, participating in the process of issuing opinions on legal regulations defining the principles of operation of pension funds in Poland. In December 2002, she joined Pekao Financial Services where she was the coordinator of the team of legal advisers and then from 2006, she was the Director of the Legal Service and Supervision Office, responsible for supervision and coordination of legal services, as well as ensuring the compliance of the Company's activities with the applicable legal regulations. She has many years of experience in managing financial institutions. She was a President of the Management Board at the transfer agent company Net Fund Administration. She was a Member of the Supervisory Board of the investment fund company KBC TFI. In 2022 she was a President of the Management Board of ZenCard From March 2010 to July 2022 she was holding the position of President of the Management Board of PKO Finat, managing an organization of over 250-people with a diversified portfolio of IT and operational services for B2B and B2C clients in the financial and banking sector.

ORGANIZER

PROGRAM PARTNER

DR ZBIGNIEW WÓJTOWICZ

President

Investors TFI

CEO of Investors TFI. Graduate of Wroclaw University of Economics and the Internationales Hochschulinstitut in Zittau (Germany). Holds a PhD in economics from the Wroclaw University of Economics. Licensed Investment Advisor. In capital markets since 2002. He started his career at Millennium Brokerage House, where he managed funds and a portfolio of private clients. From 2004 to 2008 he worked at DWS Polska as a fund manager and from 2008 to 2012 as a Deputy President and Board Member, responsible for sales and marketing. In 2012 appointed as the president of Investors TFI. During his tenure, Investors TFI was recognized as the best Investment Fund Society three times by the business daily Parkiet (in 2013, 2016 and 2018), four times (in 2016, 2017, 2018 and 2019) by the daily Rzeczpospolita and three times (for 2017, 2018 and 2019) by the industry analytical centre Analizy Online.

ORGANIZER

PROGRAM PARTNER

ARTUR WIZA

Executive Vice President
Asseco Poland

Vice President of the Management Board of Asseco Poland, responsible for the area of corporate communication. From 2012, Managing Director of Asseco Poland responsible for the Corporate Communication Area (marketing, PR and investor relations). He is also the Vice President of the Board of the Association of Digital Technology Employers Lewiatan and the Chairman of the Board at the Polish Chamber of Information Technology and Telecommunications. A graduate of the University of Szczecin, he graduated in economics at the faculty of Economic Cybernetics and Informatics. He started his professional career in 1994 at Computerland, responsible for sales to corporate clients. Since 1997 he has been associated with the Polish branch of Hewlett-Packard Polska, where he was responsible for product marketing, SMB market development, marketing and cooperation with commercial partners. From 2000, he was Marketing Director at Hewlett Packard Polska responsible for the Enterprise and Corporate market. In the years 2002–2005, the chairman of the Polish Board of Marketing Directors at the Conference Board. From September 2006 to March 2011, Member of the Management Board of Getin Holding, responsible for marketing, external and internal communication as well as investor relations. He was also the spokesman for Getin Holding, Getin Noble Bank and LC Corp. He was a member of supervisory boards of Fiolet Powszechny Dom Kredytowy, Panorama Finansów, OOO Carcade based in Kaliningrad, SC Perfect Finance S.r.l. in Bucharest and LC Corp.

GRZEGORZ ZAWADA, CFA

Director

Brokerage House, PKO Bank Polski

He has more than 25 years of experience working in financial markets, gained both in Poland and abroad. He gained his first professional experience in the National Investment Funds program as an Analyst and later as Director of New Investments. From NFI he moved to Deloitte's financial advisory department, where he carried out advisory projects for Polish and foreign investors. In 2000, he joined Erste Bank Group, where he was initially responsible for analyzing the Polish stock market as Director of the Analysis Department at Erste Securities Brokerage House Poland. In 2004, he took over as CFO of Erste Securities Polska and joined the company's management board the following year. He was responsible for finance, operations and analysis. From 2007 to 2011, he worked in the City of London as a director in the analysis departments of Nomura, RBS and HSBC banks. In 2011, he joined the PKO Bank team as Director of the Brokerage House. Under his leadership, the Brokerage House became a leading institution in the Polish capital market, receiving numerous awards and distinctions. In 2014, he became Vice Chairman of the Board of the Warsaw Stock Exchange. He was Chairman of the Supervisory Board of Bondspot, Vice Chairman of the Supervisory Board of the Polish Power Exchange and WSE representative on the WIBOR Board. In the past, he also served as a member of the supervisory boards of listed companies. From 2016 to 2017, he was a Member of the Management Board for Finance at the Polish Development Fund, while from 2017 to 2018 he served as Vice President in charge of investment banking at the Noble Securities brokerage house.

ROBERT ZIMA, CFA

President

TFI PZU

A graduate of mathematics at the Faculty of Applied Mathematics of the AGH University of Science and Technology in Krakow. He also completed doctoral studies in economics at the College of Management and Finance at the Warsaw School of Economics. He is certified by a Chartered Financial Analyst® (CFA®).In the period from October 2021 to April 2022, he was the General Director of the Ministry of Development and Technology. In the years 2019-2021 he was the Director of the Department of Financial Institutions and Financing Organizations at Bank Gospodarstwa Krajowego. He was also an external expert on the International Monetary Fund. In the years 2003-2019, he was professionally associated with the Ministry of Finance, where he dealt with the subject of public debt (including the issue of treasury bonds, management of the debt structure and state budget liquidity), going through all levels of a professional career in public administration. From 2016-2019 he was the Director of the Public Debt Department at the Ministry of Finance. Member of the supervisory boards of financial institutions, including Bank Gospodarstwa Krajowego in 2016-2017 and 2021-2022 and the Council of the Bank Guarantee Fund in 2017-2019. He has been associated with the PZU Group since May 2022.