



AGENDA

2025 LATAM CRO Conference, Miami, FL

"The Future is Now, The Future is EFG"

Date Thursday, February 27

Location EAST Hotel, Level 39, The Crush Conference Room/ 788 Brickell Plaza, Miami, FL 33131

Thursday, February 27, 2025

Time	Subject	Speaker(s)
07.00 – 08.00	Breakfast Networking	Venue: EAST Hotel – Level 38 – The Rise Conference Room
08.00	Meeting Conference Room	Venue: EAST Hotel – Level 39 – The Crush Conference Room
08.00 – 08.15	Welcome Remarks	Víctor M. Echevarría Chairman, Latin America
08.15 – 09.00	Retrospective & Outlook (45')	Sanjin Mohorovic Regional Business Head, Latin America
09.00– 09.15	Address from the Board (15')	Alex Classen Chair of the Board EFG International/EFG Bank AG
09.15 – 10.15	The Charismatic Advisor Becoming a Source of Strength in the Lives of Your Clients	David Richman Managing Director, Eaton Vance Distributors, Inc
10.15 – 10.45	Coffee break (30')	Venue: EAST Hotel – Level 39 – Networking Area across The Crush Conf Rm
10.45 – 11.30	Climbing the Stairway to Heaven: Building a Risk Resilient and Efficient Path to Operational Excellence & Growth	Demis Stucki Global Chief Operating Officer, EFG International Leo Borges Regional Chief Operating Officer
11.30 – 12.30	Breaking the Mold: Why Diversification Demands Alternative Investments	Alexander Wright Partner and Global Wealth Strategist. Apollo Global Management
12.30 – 13.45	Lunch	Venue: EAST Hotel – Level 38 – The Rise Conference Room
13.45 – 14.30	Growth and Differentiating thru Mission 70: Technology, Content, and Sophistication	Eduardo Cruz Head of Private Banking CEO, EFG Asset Management (Americas) Luis Ferreira Head of Investment Strategy Group
14.30 – 15.15	How to Grow Safely the Credit Book in LATAM	Enrico Piotta Chief Risk Officer, EFG International Claudia Ikeda Regional Chief Risk Officer
15.15 – 15.45	Coffee break (30')	Venue: EAST Hotel – Level 39 – Networking Area across The Crush Conf Rm/ All Miami Staff Invited to join Townhall



15.45 – 16.45	State of the Union	Giorgio Pradelli Chief Executive Officer, EFG International Dimitrios Politis Chief Financial Officer & Deputy CEO, EFG International
16.45 – 17.15	Closing Remarks: “The Future is Now, the Future is EFG” - Priorities going forward	Sanjin Mohorovic, Regional Business Head, Latin America
17.15 – 17.45	Group Photo Session	Venue: EAST Hotel – Level 5 – The Pool Area
17.45 – 19.00	Flexible Time	
19.00	CRO Millionaires Celebration Cocktail	Venue: EAST Hotel – Level 5 – The Pool Area
20.00	CRO Millionaires Celebration Dinner	Venue: EAST Hotel – Level 39 – The Crush Conference Room

Contact

Diana Rivera
+1 305-482-8082

Karla Colombo
+1 305-482-8140