

SECA Ticino

Integrating Private Markets into modern Wealth Portfolios

Tuesday, 2 December 2025,
Hotel Dante, Lugano
doors opening at 17:30



SECA

Swiss Private Equity & Corporate Finance Association
Schweizerische Vereinigung für Unternehmensfinanzierung
Association Suisse des Investisseurs en Capital et de Financement

Tuesday, 2 December 2025, 17:30 – 21:00
Hotel Dante, Piazza Cioccaro 5, 6900 Lugano

SECA Ticino Event

Integrating Private Markets into modern Wealth Portfolios

We are pleased to invite you to an exclusive networking evening which will focus on the current macro-economic landscape and trends in private markets, exploring opportunities for private clients and portfolio construction. The evening will feature a key-note presentation and panel discussion, followed by a relaxed Apéro riche, providing an opportunity for professionals in private equity, wealth management, and corporate finance to connect and exchange insights.

Agenda

17:30 **Registration & Welcome**

18:00 **Keynote presentation**

How private clients can leverage private markets to enhance portfolio efficiency and capture opportunities in today's market. It highlighted the increasingly positive perception of private equity and the strategic balance between liquid and illiquid investments. Emphasis was placed on constructing coherent portfolios that align client objectives with market dynamics

- Livio Dalle, Head Asset Management, Wealth Solutions SVP, Indosuez

Panel Discussion

Next-generation investor behavior and decision-making, including approaches to externalizing versus internalizing investment choices, and the role of digitalization and tokenization.

Integration of private and public markets, adoption of private market practices across geographies, experiences with SPVs and regional companies, and how digitalization enables smaller investors to participate.

- Eric Sibbern, Senior Partner & Managing Director, VERAISON Capital Ltd

- Dr Roderik J.P. Strobl, TEP, SVEB, International Wealth Manager

- Moderator: Marco Lucchin, Private Markets Lead, WExecutive & member of the SECA Ticino committee

19:00 **Networking Apéro**

Fees: Free of charge
Language: Italian & English
Registration: www.seca.ch/events

About the speaker and panelists

Livio Dalle is a seasoned wealth- and asset-management professional with extensive experience in private-client solutions and portfolio construction. He has held senior roles in multi-asset investing and portfolio management in Italy and Switzerland, including at Vontobel. Livio holds degrees in Business from Università Bocconi and Political Science from the Statale University of Milan and currently focuses on integrating private-market strategies for high-net-worth clients.

Eric Sibbern – Private Equity Professional - Experienced in bridging public and private markets, managing SPACs, regional investments, and exploring digitalization and tokenization to expand investor access.

Dr Roderik J.P. Strobl, TEP, SVEB – International Wealth Manager - Specialized in next-generation investor behavior, wealth structuring, and integrating digital assets and tokenization into private-client portfolios.

About SECA

The **Swiss Private Equity & Corporate Finance Association (SECA)** is the representative body for Switzerland 's private equity, venture capital and corporate finance industries. SECA has the objective to promote private equity and corporate finance activities in Switzerland. Private Equity refers to equity investments in privately held, non-quoted companies. Corporate Finance Services are advisory services related to mergers, acquisitions, buyouts and the financing of companies.