

Financial Translation Summer Conference

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Hotel Seaside in Spiez (CH)

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PRESENTATIONS

BERTAMINI MARA

Supertext x Textshuttle, Chief Language Officer

Biography

Being a passionate bilingual language nerd, Mara studied Romance Languages and Computational Linguistics at the University of Zurich. She then kicked-off her career in the language services department at Swiss Life, where she oversaw the company-wide implementation of a customised AI Translation solution.

In her current role as Translation Technology Specialist at Textshuttle, Mara is responsible for the implementation of specialised AI translation projects and advises clients on strategic, operational, and linguistic matters.

Abstract

CUSTOMISED AI TRANSLATION SOFTWARE IN FINANCIAL SERVICES

Expanding your own translation skills – by using customised AI translation solutions. The global financial industry is experiencing unprecedented growth and diversification around the world, reinforcing the need for seamless and continuous communication across language borders. As a result, translation volumes are steadily increasing, while at the same time ever shorter delivery times are demanded – all without sacrificing quality, of course.

This presentation demonstrates how language professionals in the financial industry can save valuable time thanks to customised AI translation and therefore fully focus on refining translated texts to meet the high demands of their clients.

Furthermore, we discuss the importance of controllability in AI translation solutions, underlining their suitability for financial and company-specific language, nuanced terminology, and compliance-oriented documentation.

Participants learn which skills are important and how they can be acquired to strengthen their position as language experts in the financial industry on the long run.

BRUGGER BRUNO

Liechtensteinische Landesbank, vice Director

Biography

Born in 1966; grown up in central Switzerland (Lucerne, Aargau).

Studies in economics at the university of St. Gallen.

Professional career in banks ever since graduation, always linked to credit topics. Current position: head credit management LLB Group (credit approval organisation, loan processing organisation, real estate evaluation at the Liechtensteinische Landesbank Group).

Abstract

ESG AND FINANCIAL MARKETS – A PROMISE FOR THE FUTURE OR AN ODD COUPLE?

Part 1: Basics of ESG in the European Union and Switzerland – basic understanding.

Part 2: Sustainable financial markets under ESG regulation – meaning.

Part 3: Financial markets and real estate investments under ESG regulation.

Part 4: Possible consequences for real estate clients under ESG rules.

Part 5: Future development of ESG regulation (EU and Switzerland).

DURBAN CHRIS

Freelance translator

Biography

Chris Durban is a freelance translator (French to English) based in Paris, where she specialises in publication-level texts for demanding clients, primarily in business strategy and financial/corporate communications. Her client portfolio includes some of Europe's top corporations as well as government, regulatory and regional development agencies. A member of SFT and a Fellow of ITI, she is also the co-founder and co-organizer of UETF, SFT's summer school for financial translators, as well as the Translate in... series of seminars for translators keen to hone their writing skills. Chris has written many articles about translation, targeting both peers and clients, and has given talks and workshops around the world. She is a former board member and president of SFT and served on the ATA board. She translates almost every day and enjoys it immensely.

Abstract

HIGH-WIRE ACT: THE PROFITABLE POWER OF NICHE IN FINANCIAL TRANSLATION

Translators specialized in finance bring genuine subject-matter expertise to the table—and must highlight that expertise through behaviours that remind clients how much they need us on their team.

Enter soft skills. (But professional skills all the same.) These naturally come on top of crack writing and translation competence. Plus the transparency and honesty to be adaptable—prepared to recommend and implement new solutions to dilemmas old and new. Plus top-tier networks that we can draw on to mitigate or even eliminate client risk. Plus the safety nets that we ourselves must put in place to avoid amplifying customers' exposure to risk.

Using examples, this presentation discusses these prerequisites. It then looks at situations where we can make things move in the right direction for all parties, in contexts where the stakes are high and the

financial rewards commensurate, so we can identify where and how translators who have acquired and honed their skills can get a foot in the door. And how linguists can best navigate critical stages in developing confidence and trust out for their services out in ClientLand.

Aimed at mid-career financial translators who want to sharpen their skills, this talk follows on from Chris Durban and Dominique Jonkers' session ("Charting your course in financial translation") at this year's ITI Conference in Edinburgh.

GABBI GIAMPAOLO

SDA Bocconi School of Management

Biography

Giampaolo Gabbi is Professor of Risk Management Practice. He is currently Associate Dean of the Custom Programs Corporate and Financial Institutions Division.

He coordinates management and board induction programs on financial risk and regulatory debate. His research focuses on risk management and asset management.

He holds courses in Risk Management and Capital Management at Bocconi University. He has taught at the University of Siena, as Full Professor, at the University of Parma as Researcher and at City University London, as Lecturer of Financial Regulation.

He is Chairperson of the Scientific Committee of the Risk Management Magazine of the Italian Association of Financial Industry Risk Managers (AIFIRM); he is Risk Management Department Editor of the Journal published by the Association of Teachers of Economics of Financial Intermediaries (ADEIMF).

Giampaolo holds a degree in Economics from the University of Parma and a PhD in Business Economics from Bocconi University.

Abstract

THE BANK CAPITAL/DEBT DILEMMA: ZHAT IS SO SPECIAL ABOUT COCO BONDS?

CoCo bonds, a hybrid between debt and equity, are issued by banks to boost regulatory capital, promising attractive returns but with complexities and risks. We will explore the rationale for issuing CoCo bonds, their complex structure and the growing interest driven by regulatory requirements. We will look at the risks, including triggering events that can lead to losses, suspension of coupon payments and conflicts of interest. European regulators have expressed concerns and provided guidance on the distribution of CoCo bonds. Using the Credit Suisse case study, we will show the impact on the market when shareholders were favoured and open a debate on preferential treatment in similar situations.

GIRARDIN MICHEL

University of Geneva, MacroGuide Sàrl, CEO

Biography

Michel Girardin is a Visiting Professor of Macro-Finance at the University of Geneva. He has more than 25 years' experience as Chief Economist and Chief Investment Officer in the Swiss private banking sector.

His online "Investment management" courses on Coursera are amongst the top 5 most popular courses worldwide, with more than 1.3 million students.

Michel holds a PhD and a B.A in Economics from the University of Lausanne as well as a Master of Science in Economics from the London School of Economics.

A regular columnist in the Swiss media, he published "La Bourse et la vie", a book which portrays – in both pictures and prose – investment icons such as George Soros, Alan Greenspan and Warren Buffett. Michel is included in the list of the 300 most influential personalities of the Swiss economic scene by Bilan magazine.

In 2013, he founded MacroGuide Ltd, an independent firm advising Asset Managers and Pension Funds on investment policy and tactical asset allocation. Michel is also a Board Member of the "International Centre for Monetary and Banking studies" (ICMB) headed by the Chairman of the Swiss National Bank.

Born in Rome - where he lived until he was 17 – with French as his mother tongue, he is perfectly fluent in English, Italian, has a good mastering of German and some understanding of Swiss German.

Abstract

INFLATION: THE GOOD, THE BAD AND THE UGLY

Nobel Prize laureate Milton Friedman famously claimed that inflation is always and everywhere a monetary phenomenon. Was he right? Was the inflation outburst of 2022-2023 the result of the ultra-loose monetary policies conducted after the Great financial crisis of 2007 and the Global pandemic in 2020?

Economists generally identify 2 types of inflation: demand-pull (the good) and cost-push (the bad).

To these 2 types, we add a third one, the Ugly. The Good inflation is what central banks dream about. And for good reason: it appears in economies that are booming. To stop it, nothing could be easier: just raise interest rates until consumers get off their knees and are cured of their buying fever. Then comes the bad inflationary shock: that which is linked to the pressures of... crude oil. Oil is the main underlying factor behind changes in production costs. The Good inflation is a consequence of an economy with super-strong growth, whilst the Bad inflation is a cause of recession. Finally, there is the ugly version, which arises from the loss of confidence in fiat money: we find it in Lebanon, Zimbabwe, and Venezuela today, and in Germany a century ago.

At the end of the presentation on the 3 types of inflation, I will give my forecasts for the world economy and financial markets.

NB: The French version of Sergio Leone's famous western movie "Le Bon, la Brute et le Truand" works even better as an allegory for the 3 types of inflation, especially for the second type "La Brute", which is often associated with tensions on the oil price (le prix du brut).

GRAF SANDRO

Zurich University of Applied Sciences, ZHAW

Biography

Sandro is the head of the Centre for Customer Experience and Service Design, a competence centre at Zurich University of Applied Sciences ZHAW. The Centre conducts research, consultancy, training, and teaching in the areas of customer experience management, service design, and design thinking. Sandro's research interests include behavioural design, strategic marketing management and service innovation management.

Before joining Zurich University of Applied Sciences (ZHAW) as a senior lecturer in 2012, Sandro was a senior consultant at FehrAdvice & Partners AG. He was responsible for implementing behavioural economics insights into marketing consultancy projects.

Abstract

USING A PEOPLE-CENTRED APPROACH TO THRIVE AS A PROFESSIONAL LINGUIST

In an ever-evolving world, the roles of translators, interpreters and editors are continually shifting. As our environment becomes more complex, understanding the customer's perspective is challenging. In this presentation, you'll learn about Design Thinking, a human-centred, iterative approach that aims to develop services with compelling value propositions. Design Thinking is not only a methodology but also a strategic mindset. It empowers professionals to understand their target audiences better and anticipate and meet their changing needs. Sandro will explore how this strategic approach ensures not

only our relevance as professional linguists but also enhances the quality and accessibility of language solutions in the era of artificial intelligence. Learn how to profit from technological advances and put customer-centricity into practice.

GUGGENHEIM BASIL

Swiss National Bank, SNB

Biography

Please note that biography and abstract are not yet available.

Abstract

INSTANT PAYMENTS IN SWITZERLAND AND THE EVOLUTION OF THE SIC SYSTEM

KOCHER CHRISTOF

FRS Markets

Biography

Christof Kocher holds degrees in business administration (MBA), and translation studies (German Diploma). In addition, as a Certified Accounting Specialist (CAS), and Certified Sustainability Reporting Specialist (CSRS), he acquired extensive knowledge of financial and non-financial reporting processes.

He is a specialist in multilingual (non-) financial reporting and is considered by consultants, auditors, and controllers to be a competent and reliable partner when it comes to preparing compliant corporate reports.

Having undertaken a series of roles and courses within Germany and abroad, he regularly is involved in large-scale translation projects as a specialist translator and project manager.

As an active member of the BDÜ, Christof Kocher is committed to furthering the interests of translators and interpreters.

Abstract

SUSTAINABILITY REPORTS: WHAT ARE THEY GOOD FOR?

With the introduction of the so-called EU Green Deal by the European Commission, things are moving fast on the European stage of corporate reporting. Larger corporations were closely aligned with GRI reporting requirements, while smaller entities typically relied on national reporting initiatives, such as the German Sustainability Code. Going forward, nothing seems to be as stable as change.

In this presentation, we shall take a closer look at the EU Green Deal, focusing on its purpose, targets, and components. Furthermore, we will shed some light on the most prominent EU Regulations and Directives, namely the CSRD and the so-called EU Taxonomy. What are the major challenges for corporates to meet the requirements laid down in these regulations?

Key concepts and terminology will be identified in the presentation, along with insights where translators and terminologists need to overcome pitfalls.

OMARINI ANNA

Bocconi University – SDA Bocconi School of Management

Biography

Anna Omarini is a Tenured Researcher and Adjunct Professor of Bank and Fintech, Department of Finance, Università Bocconi. She is the Director of the following optional courses: Bank and Fintech: vision and strategy (option in Masters degree) and Fintech for digital transformation (option in undergraduate degree).

Her cooperation with SDA Bocconi began in 1992. Since then, she has run numerous courses such as Retail Bank Management, Digital banking, Bank marketing and loyalty management. She has conducted workshops and field research projects on the following topics: bank-customer

relationships in retail banks; direct banking; quality value drivers in wealth management markets; branch innovation; evolution of payment systems and innovation in the bank industry. She has worked with both banks and insurance companies. She has also delivered Masters in Business and Banking Administration in banks for both senior and young professionals.

Her research activities focus on bank strategy; retail banking; FinTech, digital banking and open banking; bank marketing and loyalty management; payment services; quality value drivers in wealth management; bank innovation.

She is the author of numerous book chapters and articles on the subjects she has been developing for many years. She has published her books with Palgrave MacMillan, McGrawHill and Springer. Her articles have been published in the Journal of Finance and Bank Management, the Journal of Financial Transformation, the Journal of Banks and Bank Systems, the Journal of Management Studies, *Economia & Management*, *Bancaria*, *Il Risparmio* and *Banche e Banchieri*, among others. She is a reviewer for the Journal of Accounting and Finance; The Journal of Financial Management, Markets, and Institutions JFMI and Palgrave Macmillan Ltd; she is an editorial board member of *Frontiers in Artificial Intelligence*, the Journal of Management Studies. She is a member of numerous associations, organizations, and scientific committees. She also participates in conferences in Italy and abroad, as a speaker and chairman. She has also developed her experience as an independent board member in financial institutions and banks.

Anna earned a degree in Business Administration from Università Bocconi and completed an ITP Programme at the Stern School, New York University (1999).

Abstract

FINTECH IN BANKING: A NEW HEDGE FOR THE FINANCIAL SERVICES INDUSTRY. BUSINESS IMPACTS, NEW FRAMEWORKS AND MANAGERIAL IMPLICATIONS

The rise of the ever-increasing relation between technology and financial services is bringing significant changes to the banking industry. Shifting market conditions, customer needs, the entrance of new players, and digital technologies, along with new regulations—such as the Payment Service Directive 2 (PSD2) in Europe that aims to increase innovation, competition, and transparency—are all reshaping the banking industry and the financial intermediation model.

FinTechs and TechFins have allowed the introduction of new services and changed the way customers interact to satisfy their financial needs. The FinTech landscape is constantly boosting some changes in the market. Different business value propositions are entering the financial services industry, moving from increasing the user's experience to developing a time to market framework for banks to innovate products, processes, and channels, increasing the cost efficiency and looking for developing partnerships and collaborations with the newcomers.

The many businesses of banks are changing their value chains, and banks' business models should do the same accordingly. Strategists could no longer take their value chains as a given; choices must be made on what needs to be protected and maintained in the next scenario, what abandoned and the new on coming to make banks evolve and become more resilient in doing their job.

Banking is shifting significantly from a pipeline, vertical paradigm, to open banking business models where open innovation, modularity, and ecosystem-based bank's business model may become the ongoing mainstream and paradigm to follow and develop.

During our session, we will look at understanding how FinTechs have started impacting value chains in the financial services industry; how they are evolving; outline some of the new trends and their related impacts on the way both banking and banks are looking at new frameworks and paradigms to compete in the new market scenarios.

PENNONE GRÉGOIRE

ONE swiss bank, CEO

Biography

Grégoire is CEO of ONE swiss bank. In his 20 years of professional experience, he has held senior positions in banking, accounting, marketing, audit and tax. He holds a law degree, a postgraduate diploma (DEA) in tax law and an MBA from the University of Geneva. His stated goal is to create tailored and sustainable solutions that add value and meaning to ONE's clients and other stakeholders.

ONE swiss bank is a Swiss private bank with offices in Geneva, Lugano and Zurich and a subsidiary in Dubai. It provides wealth and asset management services to private and institutional clients as well as financial intermediaries.

Abstract

GEVEVA BANKING LANDSCAPE – A CEO'S PERSPECTIVE

Join Grégoire on a journey through the evolving landscape of Swiss private banking with a spotlight on Geneva, combining historical insights with a forward-looking approach. Travel back in time to uncover the fascinating history of banking from its origins in the 18th-century to the era of transparency. He will then fast-forward to the present to look squarely at the challenges the industry is facing, analysing the importance of scale, and navigating complex regulations. Grégoire will also share his views on the years ahead, including how banks can cater to the changing needs of future clients and adapt

to the potential industry consolidation. But this journey isn't just about the big picture. Dive deeper into the world of ONE swiss bank, understand its story, and discover how it stands out through agility, sustainability, and a modern brand. Learn about the bank's commitment to its employees and how it fosters a strong employer brand. Finally, he will share his vision for the future, emphasising the crucial role of innovation in driving ONE's growth strategy. This talk will be a blend of historical insight, present-day challenges, and a glimpse into the future of wealth management – all through the lens of ONE swiss bank's unique journey.

POSER JAN AMRIT, DR.

radicant bank ag, Chief Sustainable Investment Officer & Co-Founder

Biography

Dr. Jan Amrit Poser is co-founder and Chief Sustainable Investment Officer of radicant bank ag. Previously, he spent 21 years at Bank J. Safra Sarasin, where he held various positions including Chief Economist, Head of Research, Head Asset Management & Sustainability, and most recently Chief Strategist and Head of Sustainability. During this time, he also served as an expert on the relevant sustainability committees of the Swiss Bankers Association and FINMA, as well as on the Board of Trustees of the Swiss Climate Foundation, among others. Poser is well known as a speaker at conferences and a frequently quoted commentator on sustainable and economic trends.

Abstract

LAUNCHING THE FIRST DIGITAL SUSTAINABILITY BANK IN SWITZERLAND

radicant is Switzerland's first digital sustainability bank. Our ambition as a sustainability bank is to align all our products and services with the 17 Sustainable Development Goals (SDGs) of the UN, which are the shared blueprint for peace and prosperity for people and planet.

The presentation will give insights into the following topics:

- How radicant was positioned in the Swiss banking landscape,
- Why Switzerland needs a new bank, built from scratch without compromise.
- How we built a highly efficient tech stack from scratch
- How we got the Swiss full banking license in record time
- What the forecasts for the year 2050 means for humanity
- Why companies that are part of the solution for these challenges will outperform
- How we identify companies that provide sustainable solutions
- How the financial sector can pull the biggest lever by providing impact-aligned investments
- How we democratize SDG investments for the public

REYNOLDS STEPHEN

Chartered accountant and freelance translator

Biography

For the last 30 years, Stephen have worked as a freelance translator with his partner Jane Lambert, mainly on corporate reports – with a heavy slant towards financial reporting, but also straying into corporate governance and ESG. In the 1980s, he graduated from Cambridge University with a first in English and then trained (and qualified) as a chartered accountant, working as an auditor in both the UK and France.

He is also Mayor of Penzance, his hometown in the far west of Cornwall and the first town in England to have been awarded “Plastic Free” status.

Abstract

ACCOUNTING FOR THE REAL WORLD

Accounting is a translation issue: how to translate real world activities into numbers that can be interpreted, compared, audited?

When I started my career in accountancy back in the 1980s, company accounts were simply a historical record: a snapshot at a fixed point in time. Fast forward to the 2020s, and accountants are trying to translate real-world activities that are moving a lot faster.

Some of the biggest numbers in company accounts now rely heavily on judgement and assumptions rather than hard data – especially in crucial areas like purchase accounting and impairment testing.

And now, companies face the added challenge of drafting climate-related financial disclosures: well outside the comfort zone of the traditional “bean-counter”.

What does all this mean for our corporate clients, for us as translators, and for the end-users of our work? In a sea of numbers, where do we find the islands of significance? And could true cost accounting save the planet?

Join me for a whistle-stop tour of the interface between numbers, language, and the real world, informed by nearly 40 years’ experience.

STAEDLER LAURENCE

Aon Suisse SA, Head of Swiss Pension Administration

Biography

Laurence Staedler holds a master’s degree in actuarial science from the University of Lausanne (HEC Lausanne). Initially hired by Aon as a junior actuary in its Neuchâtel office in 2004, she quickly became involved in pension fund management. In 2008, she was appointed head of the management team in the Nyon office. In April 2015, she assumed responsibility for Client Services

for all management mandates in Switzerland and joined Aon Switzerland's Executive Board as a member representing the Wealth Department.

Laurence has been Head of Pension Administration and a member of the Aon Switzerland Executive Committee since April 2022.

Laurence works in French and English for pension funds of Swiss and international companies.

Abstract

2ND PILLAR: BASIC CONCEPTS, LEGAL DEVELOPMENTS, AND PRACTICAL ADVICE

In her presentation on the second pillar of Swiss pension provision, Laurence Stadler of Aon Switzerland will cover the relevant basic concepts, legal developments, and practical advice.

The first part of the presentation introduces you to the Swiss social insurance system which rests on three pillars, namely the basic state retirement, survivors’, and disability pension system (the AVS/AHV first pillar), occupational benefits (the second pillar), and the voluntary third pillar. This will enable you to understand the bases of the Swiss pension system.

In the second part of her presentation Laurence Stadler will review recent legal developments and inform you about the AVS/AHV reform, which came into force on 1 January 2024, and its impact on the first and second pillars of the pension system. She will then outline the proposed LPP/BVG reform which is soon to be put to the Swiss people for a vote.

The last part of the presentation covers various practical cases enabling you to improve your understanding of occupational pension provision and giving you some useful take-aways for your own personal situation.

The presentation materials will be in English. Laurence speaks French and English and is looking forward to answering your questions in both languages.

WORKSHOPS

BAILEY MICHAEL

Austrian Financial Market Authority (FMA)

Biography

Michael Bailey is an experienced (Austrian) German to (British) English financial market supervision translator, directly embedded in the Austrian Financial Market Authority's Banking Supervision Department. Since joining the FMA in 2014, he has been involved in translation of all aspects of banking supervision and resolution – from the cradle (authorisation/licensing) to the grave (orderly wind-down in resolution/or insolvency). Much of his work relates to Austrian banks directly supervised by the Single Supervisory Mechanism, based at the European Central Bank. He also maintains the FMA's courtesy translations of primary and secondary Austrian legislation, soft law instruments, and web content and financial literacy information.

Michael is also a National Editor for the translations of EBA Guidelines, a member of various working groups in relation to translation and terminology for both financial market supervision and public administration, and regularly presents at conferences and workshops. He is a member of the Steering Committee of the European Trados User Group (ETUG), and a Member of the Chartered Institute of Linguists and Universitas. He holds a degree in Modern Languages (German and French) from the University of St Andrews in Scotland. He writes a personal translation blog "In-house translation – outside the box" at www.transl8r.eu.

The workshop will be based on Michael's experiences as an in-house banking supervision translator at the Austrian Financial Market Authority, directly embedded within the Banking Supervision Department. It will feature new examples from the recently published German texts of CRR3/CRD6 to illustrate various aspects of supervision and banking translation.

CRR3/CRD6 were finalised as integral parts of the European Commission's Banking Package aimed at finalising Basel III.

Abstract

THE NEW BANKING PACKAGE (DE>EN)

The workshop also draws on practical examples from primary and secondary national banking legislation relating to banking supervision translation from German into English on subject matters that are currently in and out of the news headlines, and some of the typical communications by supervisory authorities towards supervised entities, sister authorities, or the public.

A set of exercises for consideration in small groups will cover frequently encountered issues in banking supervision translation, focusing on stylistic elements like rendering issues from German into English and differences in the primary and secondary legislation of different German-speaking countries. The exercises will also reflect the broad spectrum of activities that fall within banking supervision and focus on aspects of translation for different target audiences (e.g. fellow supervisors, employees of supervised banks, and the public).

BESSON CHANTAL

Aon Suisse SA, Head of Translation Services

Biography

Chantal Besson holds a degree in translation from the University of Geneva (FTI). After six years as a freelancer, she joined Aon in 2015 and worked four years in the in-house translation team in Neuchâtel. Chantal left Aon to join a bi-national Franco-Swiss organisation, where she successfully set up an internal translation department. Two years later, in October 2021, she returned to Aon and the world of occupational benefits, taking over responsibility for the company's translation department.

Chantal works from Aon's Neuchâtel office and manages mandates in French, English,

German and Italian, mainly for the Wealth department, and for Swiss and international corporate pension funds.

Chantal is bilingual in German and French, with an excellent command of English and good knowledge of Italian.

Abstract

TRADUCTION D'UNE FICHE
D'INFORMATION (F/E/D) À DESTINATION
DES ASSUREES : ACHAT VISANT À
OPTIMISER LES PRESTATIONS DE
PREVOYANCE (DE>FR)

Pendant l'atelier, les traductrices et traducteurs pourront traduire une fiche d'information destinée aux assuré(e)s d'une caisse de pensions et qui reprend un sujet de la présentation de Madame Laurence Staedler d'Aon, à savoir le rachat dans une caisse de pensions pour améliorer ses prestations de vieillesse.

Selon la langue maternelle il sera possible de traduire ce document vers l'anglais, le français ou l'allemand. Il s'agira de se familiariser avec la terminologie de la prévoyance professionnelle relative au rachat, mais encore de passer en revue les particularités et critères du type de texte que représente une fiche d'information sans oublier les attentes des destinataires. Les traductrices et traducteurs pourront ainsi découvrir à l'aide d'un exemple concret comment simplifier la complexité d'un sujet technique et de transmettre aux destinataires le concept du rachat par le biais de ce type de document. Enfin, l'objectif de l'atelier est également de permettre aux participants de profiter des informations à titre personnel.

A la fin de l'atelier, les traductions seront comparées et discutées tout en profitant des synergies des traducteurs et traductrices professionnel(le)s, les documents d'Aon étant bien sûr mis à disposition.

CLAPIS MARIO

Freelance translator

Biography

Italia 1953 – Lugano

Oltre 55 anni di esposizione al linguaggio finanziario.

Laurea con lode in scienze economiche e bancarie presso Università Cattolica - Milano. Tesi di laurea in analisi finanziaria sull'analisi dei bilanci delle imprese bancarie. Premio Agostino Gemelli 1985.

Già dottore commercialista e revisore contabile. Frequenza di corsi di formazione sul mercato dei capitali (ISMA) e per analista finanziario - Analista finanziario socio Associazione Italiana Analisti Finanziari (AIAF).

Più di 30 anni in ruoli direttivi in varie specializzazioni in banche in Italia e nello Stato Città del Vaticano. Partecipazione a progetti e commissioni di alto livello in ambito bancario e finanziario.

Più di 20 anni di intensa attività di traduzione finanziaria dall'inglese e dal francese, in Svizzera e in Lussemburgo.

Abstract

STRATEGIE DI ENHANCEMENT DEL
PORTAFOGLIO (MULTI ASSET,
INVESTIMENTI ALTERNATIVI/PRIVATE ASSET,
STILE ENDOWMENT) (EN>IT)

Una esplorazione terminologica nel mondo del wealth management e dell'asset management, con estensione agli investimenti alternativi e alla gestione in stile endowment.

Premessa sull'italiano finanziario e sulle sue modalità di scrittura e presentazione tipografica. Scelte terminologiche adatte ad un contesto transfrontaliero.

Nel workshop verrà fornita la traduzione di un gran numero di termini e concetti, con l'eventuale forma in italiano svizzero, e per una parte di essi verranno spiegate le diverse accezioni e le possibili trappole da evitare. Sono previsti alcuni esempi di testi

da tradurre e si risponderà alle domande formulate dai presenti. Al termine i partecipanti riceveranno una trascrizione dell'intero contenuto della presentazione, una proposta di soluzione degli esempi di testi da tradurre e l'indicazione delle modalità per successivi approfondimenti e contatti.

Si parla dei portafogli di individui o famiglie facoltosi gestiti interamente da una banca privata o da un family office, o dei portafogli di una fondazione o altro investitore istituzionale gestiti da un investment office.

Ricerca di sicurezza degli investitori: 1) per la custodia dei loro averi (presso una banca privata o una banca depositaria – global custodian), 2) per la serietà e gli skill dei gestori degli investimenti sul mercato, 3) per la protezione giuridica e regolamentare dei veicoli d'investimento.

Determinazione del profilo dell'investitore: status d'investitore, obiettivi d'investimento, orizzonte temporale, fonti di spesa e di entrata, capacità di sopportazione delle perdite, ecc.

La multidimensionalità a tutti i livelli della gestione di portafoglio: 1) delle variabili di rendimento, rischio, volatilità, liquidità, sostenibilità, ecc., 2) delle "classi di attività", 3) dei gestori degli investimenti sul mercato, 4) delle strategie e tecniche di gestione, 5) delle divise d'investimento, ecc.

Universo d'investimento, strumenti cash e derivati, strumenti strutturati, strumenti collettivi, ecc.

"Classi di attività" e asset allocation. L'investimento settoriale, regionale, tematico, ecc. L'investimento in base ai fattori di rischio (factor investing).

Gestione attiva e gestione passiva.

Concetti di misurazione: tasso, rendimento, rendimento complessivo, performance, media, varianza, volatilità, duration, indice, benchmark, beta, alfa, track record, tasso interno di rendimento, multiplo sul capitale investito, drawdown, correlazione, leva finanziaria, rendimento atteso, volatilità

attesa, rendimento assoluto e rendimento relativo, ecc.

Mismatch tra metriche di rendimento a breve termine e obiettivi d'investimento a lungo termine.

Strategie di gestione parziali (relative ad una singola componente del portafoglio) e strategie che considerano l'intero portafoglio.

La liquidità nei suoi vari significati: 1) come classe di attività esplicita nell'intero portafoglio, 2) in un fondo d'investimento retail, 3) in un fondo d'investimento chiuso, 4) in un fondo d'investimento alternativo di private asset, 4) come flusso implicito dei vari investimenti in un portafoglio complessivo, 5) come possibilità di uscire da una forma d'investimento, ecc.

Classi di attività tradizionali e classi di attività alternative.

Le ipotesi di base a sostegno della gestione dei grandi patrimoni e le diverse preferenze in materia, ad esempio, tra investitori statunitensi e investitori europei.

Single asset e multi-asset.

Investimenti alternativi: 1) "speculativi" (ad es. hedge fund), 2) in classi di attività non tradizionali (ad es. ETF su bitcoin), 3) in private asset (ad es. i FIA/FIAR o gli ELTIF lussemburghesi), ecc.

La selezione e la due diligence dei gestori. L'allineamento di interessi tra il general partner e gli investitori.

Private asset: private equity, private real estate, private debt, ecc. Meccanismi di funzionamento dei relativi veicoli d'investimento (vintage, impegni, richiami di capitale, distribuzioni, ecc.).

Diversità di metriche di misurazione tra le diverse tipologie di fondi d'investimento.

Il patrimonio di dotazione (endowment) e la gestione in stile endowment.

La fissazione di obiettivi di rendimento al netto dell'inflazione.

La capacità di erogare la spesa anche nei periodi di rendimento negativo del portafoglio.

ERRANTE EDWARD

Legal translator and retired lecturer in law

Biography

Edward Errante trained as a lawyer. He received a Juris Doctor from the University of California at Berkeley and practised law in San Francisco, California, for eight years.

A sabbatical year teaching US law at Université de Paris X (Nanterre) led to a career change and to relocation in France. For the next 33 years, Edward taught US law in the French university system. He spent the last 23 years of his academic career at Université de Paris II (Panthéon-Assas), teaching the US law module in two of the university's highly rated Master 2 programmes in business law.

His interest in translation developed when a Law of Contracts textbook he wrote for his students was translated into French. Working with the translator hired by the publisher introduced him to the interesting intellectual exercise of translation, which evolved into a second line of business translating legal documents. He has been a freelance legal translator since 2002.

Abstract

TRANSLATION OF FINANCIAL CONTRACTS FROM A LEGAL TRANSLATOR'S PERSPECTIVE: ISSUES AND CASE STUDIES (FR>EN)

The fields of law and finance often overlap. For example, legal translators may be asked to translate a wide range of documents relating to financial matters, such as companies' regulatory disclosures (annual and other periodic reports), court documents in cases involving financial disputes (pleadings, judgements) and, of course, contracts relating to financial matters. Conversely, financial translators may be asked to translate legal documents, usually contracts that financial institutions

enter into with their clients, such as bank account agreements, loan agreements or asset management agreements.

This workshop will focus specifically on the translation of financial contracts, not only because the law-finance crossover is probably most frequent in this type of document, but also because the stakes for accurate translation are arguably the highest. Contracts are prescriptive in nature and create binding obligations; it is therefore crucial that all parties clearly understand the legal obligations they have undertaken.

It will also be argued that fidelity to the meaning of the text is paramount and that, given the specific complexities of translating financial contracts from French to English, achieving fidelity to the meaning often requires departing from the form and syntax of the source text to render a comprehensible English translation.

This approach will be demonstrated using excerpts from a variety of contracts that financial translators are often asked to translate, including bank account agreements, loan agreements, investment fund prospectuses and asset management agreements. These documents will be made available to participants prior to the session so that they can work on them in advance and propose their translations at the session, creating the opportunity for an interactive workshop.

IMBESCHIED ANDREA

Vaudoise Assurances

Biography

Before Andrea Imbescheid turned her passion for languages into a career, she worked for many years in international marketing for consumer goods (Wella AG, Procter & Gamble). In 2017, she completed a master's degree in specialised translation at the Faculté de Traduction et Interprétation at the University of Geneva. Building on her marketing expertise, her master's thesis focused on transcreation,

and she has been offering workshops and seminars on transcreation since 2018. Andrea Imbescheid currently works as a translator in the Language Competence Centre at Vaudoise Insurance in Lausanne where she acquired additional expertise in the insurance sector. Originally from Germany, she has been living in Geneva since 2003.

Abstract

FACHÜBERSETZEN FÜR DIE
VERSICHERUNGSBRANCHE (FR>DE)

Please note that this abstract is not yet available.

JONKERS DOMINIQUE

Jonkers and Partners

Biography

Please note that this biography is not yet available.

Abstract

ATELIER INTERACTIF SUR DES THEMES
D'ACTUALITE : INFLATION, POLITIQUE
MONETAIRE, MARCHES (EN>FR)

Plutôt qu'un exposé ex cathedra sur la technique financière, on vous propose un atelier interactif, en situation réelle.

Votre mission : convaincre un nouveau client que vous êtes le ou la prestataire qu'il lui faut.

Votre stratégie : démontrer vos compétences à partir de quelques (brefs !) passages de textes financiers consacrés à différents thèmes.

Concrètement, vous recevrez ces passages à traduire en amont, et serez invités à renvoyer vos traductions à l'animateur après un délai raisonnable, afin de préparer le terrain pour l'atelier. Chaque participant, novice ou expert, pourra ainsi comparer ses traductions — anonymisées — à celles de ses collègues.

Quelle approche choisir ? Quelle démarche adopter ? Quelles questions se poser ?

L'atelier sera l'occasion de fructueux débats.

Vous verrez : pour affûter votre arsenal, progresser et vous montrer ultra-convaincant(e), rien d'aussi éclairant que de croiser le fer avec des collègues.

RÜTH LISA

Ralf Lemster Financial Translations GmbH

Biography

Lisa Rüth ist Übersetzerin aus Leidenschaft. Als geschäftsführende Gesellschafterin der Ralf Lemster Financial Translations GmbH, einem auf den Finanzmarkt spezialisierten Übersetzungsunternehmen mit Sitz in Frankfurt am Main, unterstützt sie anspruchsvolle Kund:innen mit treffsicheren Übersetzungen aus dem Englischen ins Deutsche. Sie hat einen Masterabschluss in Sprache, Kultur, Translation für die Sprachen Spanisch und Englisch von der Johannes Gutenberg-Universität Mainz und hat sich seither zur SRI Advisor (EBS) und geprüfte Business-Trainerin BDTV weitergebildet.

Abstract

EINE FRAGE DES STILS (EN>DE)

Was macht gute Finanzübersetzer:innen eigentlich aus? Ganz einfach: Sie kennen sich aus – und das nicht nur in der Finanzwelt, sondern auch und gerade in der Sprache. Sie kennen nicht nur den Unterschied zwischen Optionen und Futures, die Zusammenhänge der Makroökonomie und die Feinheiten der Rechnungslegung, sondern sie wissen auch um die Kraft der Wortwahl, die Bedeutung des Satzbaus und die Kunst des Timings. Gerade in Zeiten der maschinellen Übersetzung bietet uns dieses Wissen die Möglichkeit, uns von der Masse abzuheben.

In diesem Workshop besinnen wir uns deshalb auf unsere Kernkompetenz: das Schreiben und Übersetzen. Anhand aktueller Texte wollen wir uns mit den Möglichkeiten der deutschen Fachsprache – insbesondere im Vergleich zum Englischen –

auseinandersetzen, denn auch in der ach so trockenen Finanzwelt finden sich schliesslich genug Möglichkeiten, um mit Sprache zu spielen, zu zaubern und um unserer Freude an sprachlicher Finesse freien Lauf zu lassen.

SALSNIK ERIKA

Swiss National Bank, SNB

Biography

Dopo gli studi all'Ecole de Traduction et d'Interprétation (oggi FTI) di Ginevra e alcune esperienze di lavoro in servizi di traduzione del mercato privato, ha lavorato nella ricerca e nell'insegnamento per diversi anni presso l'unità di italiano dell'ETI. In seguito a vari anni di esperienza in servizi di traduzione di società svizzere, si è specializzata nell'ambito della traduzione economica lavorando come traduttrice interna ed esterna per diverse istituzioni svizzere e internazionali. Dall'autunno del 2016 è responsabile del Servizio linguistico italofono della Banca nazionale svizzera a Zurigo.

Abstract

TRADURRE PER UN'ISTITUZIONE SVIZZERA: PANORAMICA DELLE SFIDE, ESEMPI CONCRETI ED ESERCIZI TRADUTTIVI TRATTI DAL LAVORO ALLA BNS (EN/DE>IT)

Il workshop mira a presentare il lavoro di traduzione del Servizio linguistico della Banca nazionale svizzera (BNS) e proporre un'analisi delle sfide principali cui è confrontata un'istituzione svizzera di questo genere. Sulla base di alcuni esempi concreti di traduzione dall'inglese e dal tedesco sono analizzate le difficoltà del lavoro del servizio e proposte le soluzioni scelte.

Primo obiettivo del servizio, istituito nell'autunno del 2016, era (e rimane in parte ancora) approfondire le conoscenze tecniche della materia trattata e creare un wording e una terminologia per le pubblicazioni ufficiali della BNS in italiano. Dalla conduzione della politica monetaria alla stabilità finanziaria,

dall'approvvigionamento del circolante ai sistemi di pagamento senza contante e alla gestione delle riserve monetarie, la specificità delle tematiche affrontate nonché la grande attualità di alcune comunicazioni rendono talvolta difficile il confronto con testi paralleli. Inoltre, l'orientamento internazionale e l'impiego talora obbligato di fonti estere mettono in evidenza differenze terminologiche e concettuali fra Svizzera e Italia. Infine, l'importanza delle pubblicazioni ufficiali di un'autorità come la BNS che impone la massima correttezza e aderenza al testo di partenza pone sfide traduttive analoghe a quelle di altre istituzioni svizzere. A ciò si sono aggiunte negli ultimi anni le difficoltà legate al linguaggio inclusivo e alla necessità di creare un sistema coerente in questo ambito per l'italiano alla BNS. Il workshop si propone di offrire una panoramica su queste problematiche.

TRANSLATION SLAMS

EDDY-PIERRE LARRA

Biography

J'ai 37 ans, je suis marié et j'ai deux enfants.

J'ai obtenu mon Master en traduction à l'université de Grenoble en 2009, un diplôme dirigé par Mme Elisabeth Lavault.

Après deux stages en Suisse (Berne et Nyon), un crochet par Paris et un autre en Suisse (à Biel-Bienne), j'ai rejoint le sud de la France pour travailler dans une agence.

Freelance depuis 2016, ma clientèle principalement suisse (banques et assureurs notamment) m'a permis de me spécialiser en traduction économique et financière. J'ai par la suite suivi des formations pour me perfectionner en finance durable et RSE. Je vise la certification en finance durable de l'AMF (Autorité des marchés financiers) en février 2024.

Guitariste amateur, je joue dans un groupe depuis 2021, où nous reprenons et composons des titres blues rock.

instructor team. In 2019, he was the French Language Division's Distinguished Speaker at the ATA 60th Annual Conference in Palm Springs, California, where he delivered a two-hour style workshop for French-to-English translators. He has been a freelance translator and editor for 18 years and is a qualified member of the Institute of Translation and Interpreting.

HEMMINGS MARTIN

Biography

Martin Hemmings is a French-to-English translator and English editor based in Manchester, north-west England. He specialises in international development, humanitarian affairs, and corporate and institutional communications, working mainly for governments, NGOs, international organisations, and corporate clients. He holds a bachelor's degree in modern languages from the University of Oxford and a master's degree in translation studies from the University of Salford.

Martin is a regular presenter at the Financial Translation Summer Conferences organized alternately by ASTTI and SFT, and a member of the Translate in.../On traduit à...

Summer Conference for Financial Translation

3-5 July 2024

ASTTI

Schweizerischer Verband für Übersetzen, Terminologie und Dolmetschen

c/o Kompetenzzentrum Stiftungen der Von Graffenried Gruppe

Zeughausgasse 18

CH-3001 Bern

Tel. +41 (0)56 664 88 10

astti@astti.ch

www.astti.ch

