

# Bernard Coupez

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## **PROFILE**

▪ **30 years of experience in finance, banking and regulation (Paris, Luxembourg and Brussels)**

▪ **Languages: French, English, Dutch and Spanish**

Born on 17<sup>th</sup> June, 1960 in Brussels, Belgian, married, children.

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## **WORK EXPERIENCES**

### **Finance & Regulation - Brussels**

✓ **Co- Founder** ( from september 2014)

*Advising players in financial services industry (professional bodies, non-profit organisations or financial institutions) on **financial regulation issues with European public institutions.***

### **Strategy & Regulation - Paris**

✓ **Partner** ( from 2013)

*Advising players in financial services industry on **financial regulation issues with French public authorities.***

### **Asatys Partners - Paris**

✓ **Partner** ( from 2013)

*Advising fund management companies, mutual funds, insurance companies for improving the implementation of **new regulatory environment in finance.***

### **BNP Paribas Investment Partners - Paris**

✓ **Head of Regulatory Affairs** ( 2007-2013)

*Subjects covered as examples: implementing **new investor information rules after MIFID for European marketing products**, advising internally and externally on the **revised Directive on UCITS** and on the discussion about **Key Information Document** and the passport for fund management companies.*

✓ **BNP PARIBAS QUANTAMERICA, Non-Executive Director** ( 2012-2013)

*Fund managed by BNP Paribas Asset Management Subjects covered as examples: implementing **new investor information rules after MIFID for European marketing products**, advising internally and externally on the **revised Directive on UCITS** and on the discussion about **Key Information Document** and the passport for fund management companies.*



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Taught subject: **IFRS Rules for investors: Interpreting Financial Statements (2004-2008)**.

- **Junior Lecturer** at Training Center of the **French Society of Financial Analysts - SFAF (1997-2003)**.

Taught subjects: *Financial statements Analysis and Reporting (1997-2000)*, *Trends in the brokerage and asset management industries (2001-2003)*.

### ACADEMIC CONFERENCES

- B. Coupez & J. Regniez « **Démographie et Crises Financières** », , 58ème Congrès, Valladolid, 19 to 22 May 2013, organised by Association Internationale des Economistes de Langue Francaise.

### THINK TANKS AND PROFESSIONAL CONFERENCES

- **Investor Conference 2012**, London, 9 March 2012, Speaker, “ Investor Protection in AIFM before MIFID 2 and UCITS V”.
- **ITAS Conference Luxembourg**, Luxembourg, 8 December 2011, Speaker, “ Preparing for UCITS V and AIFM: Impact of UCITS V Level 2 on Fund Manager Product & Product Development.
- **Distribution Remuneration Debate in Europe : regulatory implications overview 2011**, Speaker, BNPIIP Conference, Paris, December 22, 2011.
- **DII Forum OPCVM**, 10 to 11 March 2011, Speaker, “Mesurer et anticiper les impacts opérationnels d'AIFMD: après UCITS IV et avant UCITS V”.
- **Asset Management Distribution Roundtable**, Paris, 27 October 2010, Speaker, Session “ Ucits IV, MIFID updates and Prips : developing an effective response the next round of rules”.
- The **Eurofi Financial Forum 2010**, organised with the Belgian Presidency of the EU, Brussels, 27 to 30 September 2010, Speaker, Session “ Improving retail investor protection”.

### EDITORIAL RESPONSABILITIES

- Member of the editorial staff, then director of publication, the review « **Analyse Financière** », (2001-2004).
- A monthly chronicle as Deputy Investment Strategist and Head of Equity Research within BNP reviews published by Wealth management and Asset Management Departments (1995-2000). Subjects covered : macroeconomic, monetary and political issues in asset allocation for fund managers.

### REPORTS

- B. Coupez, E. de Lutz, X. Reille «**Paradoxes et Défis de la Microfinance : une industrie qui résiste à la crise, une nouvelle classe d'actifs** », in « Rapport Moral sur l'Argent dans le Monde, Paris, 2009.

- Forum Group, « **Financial Analysts: Best Practises in an integrated European financial Market** », Recommendations to the European Commission services, September, 4, 2003, Brussels, 150 pages.
- « **The European Capital Market: the Financial Analyst's view** », in « The European Financial Markets Reform », Papers of the Fundacion de Estudios Financieros, N°5, april 2004, Madrid.

## BOOKS

- Ph. de la Chapelle & B. Coupez, “**L'Evaluation des Entreprises**”, Economica, 2002, Paris, 158 pages.

## OTHER ACADEMIC ACTIVITIES

- **Member of the “Jury du Meilleur Mémoire Financier”**, organized by the French “Centre des Professions Financières” (since 2004). Each year, around 290 applicants, mainly from France, Belgium and Great-Britain. Subjects covered : economics, finance, regulation related with financial services industry.

## EDUCATION

- **Master degree in Economics (Banking and Monetary Policy)** (1983)  
University of Louvain, Belgium. *Master report driven by Baron Alexandre Lamfalussy (former Chairman, European Monetary Institute and former Director General, Bank of International Settlements).*
- **Bachelor degree**, Facultés Universitaires St-Louis, Brussels (1978-1980)

## PROFESSIONAL BODIES MANDATES

- **Vice-Chairman of the Luxembourg Society of Portfolio Managers** (ALGAFI) - (1988-1991).
- **Chairman of the French Society of Financial Analysts** - Société Française des Analystes Financiers - **SFAF** (May 2000-May 2004). Development of services for 1500 members, managing the team of 20 employees with the general secretary, *relationships with other professional bodies. Active contribution in the technical and political debate about the Financial Security Law (2003).*
- Member of the Executive Management Committee of EFFAS, **European Federation of Financial Analysts' Societies** (2001-2004).

## TECHNICAL MANDATES (AS EXPERT)

- **Vice-Chairman of the Forum Group on Financial Analysts of the European Commission**, Internal Market Directorate (2001- 2003). *The recommendations included in this report (150 pages) have been implemented in two Directives: Market Abuse and MIFID.*

- Member of the **Auditors Liability Forum Group** of the European Commission, Internal Market Directorate (2005-2007).
- Member of the CESR's Technical Group dedicated to **Key Investor Information by the Committee of European Securities Regulators** (2008-2009).
- Member of AMF's Steering Committee "**UCITS IV**" transposing the directive into French law (2010).
- Member of AMF's Steering Committee "**AIFM**" preparing the transposition into French law (2012).
- Member of several internal working groups (French Asset management association AFG or European Asset management association EFAMA).

### INSTITUTIONAL MANDATES

- **Chairman of the BNP Paribas Employee Shareholders Association - ASRAS** BNP Paribas (May 1998 - February 2009).  
From 200 members to 1400 members, managing a team of young voluntary retirees with the general secretary. Employee shareholders account for around 5% in BNP Paribas Group shares. Member of Federal Council of FAS, the French association of Employee shareholders associations.
- Member of the **Shareholder Liaison Committee, BNP Paribas Group** (Chaired by Michel Pébereau, Chairman, BNP Paribas Group), 2005-2011.
- Member of the **Consultative Committee "Retail Investors" of French market regulator, Autorité des Marchés Financiers (AMF)**, since may 2007.  
*The five Consultative Committees are appointed for advising the Board of Directors.*
- Member of the **International Advisory Board, Euronext and Nyse-Euronext** (1999-2009)

### NON-PROFESSIONAL MANDATE

- Vice-Chairman of the French Section of Friends and Alumni of the University of Louvain (since 2000).