



The world of Super LPs: How can Investors Benefit from Size and Scale?

Lukas Erard

Managing Director & Head of Global Alternatives Distribution (ex-US) UBS

The world of Super LPs: How can Investors Benefit from Size and Scale? Unified Global Alternatives (UGA) is UBS's Alternative powerhouse, building on the strengths of our leading alternatives manager selection franchises, serving the needs of clients of both divisions, Wealth Management and Asset Management). In combination, UGA manages ~USD 280bn in invested assets, making UBS UGA a top 5 global player and LP in Alternatives. How can UGA support you in navigating Alternatives to the benefit of your investors? More precisely, what is the science behind the UBS approach to Alternatives for our own wealth management clients? In this session, we'll discuss UGA's strategy for alternative investments, how we provide enhanced access to exclusive opportunities, how we believe a comprehensive offering for private clients could look like and explore the flexible toolkit we offer to distribution partners, designed to deliver measurable business impact through top-line growth and bottom-line savings. Additionally, we'll also share some of the concepts we're currently developing and look forward to refining them together with you.

Lukas Erard is Head of Distribution (Ex-US) at UBS's Unified Global Alternatives, based in Zurich. UGA combines the manager selection capabilities from across UBS's Asset Management and Global Wealth Management businesses to serve the needs of its UHNW, institutional and wholesale clients globally. Lukas leads an international team of alternative investment specialists who provide advisory services on investments across all asset classes within UGA. He is responsible for driving business development outside of the US across all client segments. Lukas joined Credit Suisse in 2007, where he held various positions within Asset Management and the Private Bank. From 2016 to 2023, he played a pivotal role in building and expanding Credit Suisse's private equity business, initially serving as COO of the team and later as Global Head of Private Equity Distribution. Prior to this, he was the Head of Alternative Investments and held positions in business development and client advisory for Credit Suisse's hedge fund products in Switzerland and Germany. He also served as COO of the Private Banking Alternative Investments Group. Lukas is a passionate investor in the alternative investment space and has been since early 2000.

