

IFIS Executive Plan 2026 (Update January 2026)

Relationship Management / Corporate Members

Atoz Tax Advisors Luxembourg Nothing to report.

Chamber of Commerce. Nothing to report.

PwC. Krisztina Szenci and ASM met with Paul Horvath, Partner and Sustainability Leader at PwC, to discuss the further development of our collaboration. He was enthusiastic about our mission and immediately volunteered to sponsor premises and equipment for an IFIS Roundtable Event, video-streaming an expert from overseas as was done for Alison Taylor with the support of ATOZ. He also readily thought that sponsorship funds of circa €5,000 might be found to support an Integrity Conference.

Luxembourg Stock Exchange. Nothing to report.

Spuerkeess. The Greenwashing event sponsored by Spuerkeess was completed successfully.

VP Bank Luxembourg. Nothing to report.

Recent Events 2025 (September through December)

We had a busy autumn with a luncheon conference with David Schrieberg on 22 September, an IFIS Roundtable Event with Alison Taylor sponsored by ATOZ on 8 October, and the Greenwashing conference with Prof. Andreas Hoepner sponsored by Spuerkeess on 28 October.

Next Events

We are currently preparing the groundwork for the new, low-cost, interactive “IFIS Exchange” format designed for up to 20 persons in informal discussion led by local experts. The first event explores *Space and Sustainable Finance*, led by Sabrina Alam, Director and EU Space Lead at KPMG. We are seeking speakers for another luncheon, and currently discussing potential speakers for a 2nd IFIS Roundtable event in the near future. We are also discussing the launch of an Integrity Conference in early summer.

Additional potential speakers (in contact)

Claude Marx – CSSF (HW)

Karel Lanoo, Centre for European Policy Studies (ASM)

Tom Théobald – CEO Luxembourg for Finance (tbd)

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Management Accounts 6 months to 31 December 2025

Based on unaudited management reports, total Income has amounted to €15,775 and expenses of €8,725. Currently, total reserves amount to €21,140 plus the 6-month surplus of €7,050.

Budget Integrity Conference

Please view a Proposal for a “flagship” IFIS Integrity full day conference attached in addition to the attached Excel spreadsheet including project financial forecasts.

Based on quotes obtained from Chambre de Commerce, we estimate the total costs of the proposed event to be in the order of €26,000 (110 participants). This includes welcome

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coffee and breaks, buffet lunch and dinner. Also included, we budget travel compensation for speakers in the order of €1,050 each for four speakers.

We would seek to cover this through sponsorships ranging from:

One Premier Sponsor at €7,500

One Lead Sponsor at €5,000

Two Co-Lead Sponsors at €2,500

Two Sponsors at €1,500 each.

Total Sponsorship income of €20,500

The projection includes participation fees between €100 for non-members down to €60 for members. Our forecast projects participation fees of €9,400. On this basis, total income would exceed projected costs by over €4,000 – near sufficient to compensate for the lack of a “Lead Sponsor”.

We wish the board to consider that IFIS is overcapitalized for its activities. Expense accrual is gradual depending on event activity and loss per event (normally in the order of €1,500 for larger events) is measurable in terms of the number of hours dedicated to event preparation and regular administration. A discussion can be had that required reserves of €9-11,000 would be sufficient, leaving over €10,000 available to back unfunded events or other performance enhancing investments.

A proposal for a Minimum Reserves Policy is attached.