



### Speakers

Our speakers come from all over our specialised and complementary teams, covering all legal, regulatory, taxation and advisory aspects of doing business in Luxembourg. We invite you to check our training agenda on our website where the speakers are listed on each training session.



### Target

Experienced professionals of the Investment Management Sector.



### Duration

2.5 hours



### Language (customised)

English, French

## The CBDF directive - impacts on the UCITS/ AIF Marketing World

### Objectives

Are you anxious about the CBDF rules, or simply curious? How do these new principles impact the marketing of your funds in Europe?

The Directive with regard to cross-border distribution of collective investment funds, amending the UCITS Directive and the AIFM Directive (the “CBDF Directive”) and the Regulation on facilitating cross-border distribution of collective investment funds and amending the EuVECA and the EuSEF Regulations (the “CBDF Regulation”) were published on 12 July 2019 in the Official Journal of the EU. The new regime under the CBDF framework entered into force on 1 August 2019.

This session will walk through the various issues raised by the CBDF rules (including applicable timelines, practical implications and the implementation status of the directive) and aims at demonstrating what would be changing in the UCITS / AIF marketing / distribution world. It will cover a range of topics, from the definition of pre-marketing, to the new terms governing marketing passport maintenance and facilities for retail investors, through to harmonising the de-notification process – not forgetting the new marketing documentation requirements and the centralisation of the information at ESMA level.

### Content

- The CBDF directive and CBDF regulation
- Details on “grey areas” arising from the texts voted
- Questions and answers