

# Asian Wealth Management Forum 2018

8.40am Registration

9.00am Welcome Address

Malik S. Sarwar  
CEO  
K2 Leaders

9.05am Panel Discussion

The What and How of differentiated WM 2.0

- Has anything really changed in this industry over the last ten years?
- Has the WM industry truly become client centric or are wealth managers still just sales focused?
- How have you changed your business model to be client centric? How has frontline comp changed to align to client interests?
- What tangible digital progress has been made and what's your client feedback?
- What is the biggest scope of disruption? Who will benefit most: big banks, FinTech's or BigTechs?
- What next: AI, big data and its impact?
- More opportunity for boutique / independent wealth managers?
- What's your strategy for millennials? What's your strategy for women?
- Does any young person want to be a private banker today?
- How can you continue to cut cost without killing the client proposition?
- What's your view on competency standards / continuous professional education?

Chair

Malik S. Sarwar  
CEO  
K2 Leaders

Speaker

Su Shan Tan  
Head of Institutional Banking  
DBS Bank

Pierre Masclet  
Asia Chief Executive Officer, Singapore Branch Manager  
Indosuez Wealth Management

Michael Blake  
Chief Executive, Asia  
UBP

Eng Huat Kong  
Senior Managing Director, Chief Executive - Singapore Branch  
EFG International

Edmund Lin  
Partner & Director, Global Head of Financial Services  
Bain & Company

9.55am

Presentation  
Recent Trends and Developments in Investor Migration

Nirbhay Handa  
Group Head of Business Development  
Henley & Partners

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

10.05am

Presentation  
How to use Structured Investment Solutions in a changing market

Jeremy Ng  
Managing Director & Chief Executive Officer, Asia  
Leonteq

- A suitable solution for each market conditions
- Benefit from market volatility
- A great diversification tool

10.15am

Panel Discussion

Is international private banking in structural decline?

- How are the wealth management markets developing onshore?
- Offshore / onshore. Where is the long-term opportunity?
- Who is making a commitment to building an onshore business?
- Is there a hybrid model where international banks can work with onshore banks?
- Right partner and right market? What's the potential to collaborate? Will it work?
- Cross-border challenges – CRS and AEOI
- How is Singapore is changing the Wealth Management global landscape?
- How important is Singapore today as a center for wealth management from Chinese clients?
- Is international private banking in structural decline?

Chair

Malik S. Sarwar  
CEO  
K2 Leaders

Speaker

Vincent Magnenat  
Limited Partner, Global Head of Strategic Alliances, Asia Regional Head  
Lombard Odier

Alvin Lee  
Country CEO Maybank Singapore  
Maybank

Michael Gerber  
Chief Executive Officer  
360F

Conrad Lim  
Managing Director & Deputy Chief Executive Officer, Senior Regulatory Counsel Asia  
LGT Bank

Kimmis Pun  
Managing Director, Head of Private Banking, Singapore  
VP Bank

11.00am                      Presentation  
Current Wealth Management Trends

Irene Lee  
Business Development Director, Intermediary and Partnership  
Hawksford

- Overview - Asia in General; [GDP and Growth](#)
- Updates on Singapore and Hong Kong as Wealth Management Centres
- Updates on CRS and AEOI
- Tax Compliant Estate Planning Tools

11.10am                      Refreshment & Networking

11.35am                      Presentation  
The Most Overlooked Asset

Karen O'Hanlon  
Senior Director, Private Wealth Services  
JTC

- Luxury asset opportunities for wealth managers
- Understanding the luxury asset game in Asia
- What's next for our clients, their luxury investments and defining your role

11.45am                      Panel Discussion  
  
Platforms / Digital – what's the future?

- What's working? What's not working?
- Fintech fatigue?
- Is it now time to just plug and play?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Mark Nelligan  
Chief Executive Officer  
Pershing Singapore, a BNY Mellon company

Anthony J. Harper  
Chief Executive Officer and Co-Founder  
Axial Partners

Steve Knabl  
Chief Operating Officer & Managing Partner  
Swiss-Asia Financial Services

Ross Milward  
Chief Technology Officer & Co-Founder  
Quantifeed

12.15pm

Panel Discussion

The Art and Science of Wealth Solutions

- What are the trends we are seeing in wealth solutions globally?
- Back to Basics – do we need to simplify the structures we use?
- What's the role of international financial centres today?
- Offshore vs mid-shore
- The challenges for family succession
- How can RMs have a proactive, sensible and sensitive conversation around wealth solutions with clients?
- What's the role of insurance?
- How will clients diversify their assets?
- How will clients approach their legacy planning today?
- How can you participate in the increasing offshoring of Chinese wealth?
- Update on CRS and AEOI

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Lee Wong  
Head of Family Services, Asia  
Lombard Odier

Keith Harrison  
Chief Executive Officer  
Abacare

Zac Lucas  
Founder, Head of Legal  
Centenal

Karen O'Hanlon  
Senior Director, Private Wealth Services  
JTC

An Kelles  
Director GCC  
Jersey Finance

David Varley  
Chief Partnership Officer - Brokerage, International HuBS  
Sun Life

Peter Tsih

Group Chief Executive Officer  
Howden Private

1.05pm

Lunch & Networking

1.50pm

Room A – Workshop

Demystifying structured products

- How structured product works
- Factors affecting the product price
- Liquidity and valuation on secondary market
- Common misconceptions

Xavier Burkhardt  
Executive Director  
Leonteq

Erick Wattebled  
CEO, Singapore  
Leonteq

1.50pm

Room B – Workshop

The World's Leading Residence and Citizenship-by-Investment Programs

- Overview of Immigration programmes
- The leading Citizenship-by-Investment Programs in the Caribbean
- European Citizenship-by-Investment in Malta and Cyprus
- Attractive European Residence-by-Investment Program

Nirbhay Handa  
Group Head of Business Development  
Henley & Partners

2.30pm

Room A – Workshop

Managed Accounts in Asia

Managed accounts are one of the largest and fastest growing segments of the wealth management market globally, eclipsing \$5 trillion of assets in the U.S. market alone. Increasingly they are available in Asia as an important tool for wealth managers to access third party asset managers to implement tailored and transparent solutions for their discretionary portfolio management clients.

- What is a managed account?
- How does it work?
- Making money for clients with managed accounts
- Why is a managed account relevant in Asia today?
- Who is Axial Partners?

Anthony J. Harper  
Chief Executive Officer and Co-Founder  
Axial Partners

2.30pm

Room B – Workshop

Update on developments in regulation and compliance impacting the Wealth Management Industry in Asia

An interactive discussion on the challenges of complying with the multitude of different approaches by Jurisdictions in the region to cryptocurrency regulation, and on the new challenges introduced by the UK Criminal Finances Act 2017, including the new corporate offences of tax evasion, adequate procedures and Unexplained Wealth Orders, and why this new UK legislation cannot safely be ignored in Asia.

Gez Owen  
General Counsel and Head of Content  
Hubbis

3.10pm Refreshment & Networking

3.30pm Panel Discussion

Product Gatekeepers

- How will you help clients shift mindset, investing style and portfolio holdings as the market transitions to a more volatile end-of-cycle phase?
- How would you explain your investment process and philosophy?
- Given the positive market performance up to the end of 2017. How can you explain what value you added to your clients?
- Impact of key business mega-trends of passive investments, fees, transparency, regulations; How are you adapting to grow?
- You had a great year in 2017. What's your revenue replacement strategy for the next two years? Is there a likelihood you will see outflows this year?
- How important is credit risk today?
- How is the move to advisory and discretionary coming along?
- Given more challenging market conditions – is advice is more important than ever?
- Opportunities of key market mega-trends of millennial, baby boomers, women empowerment, ESG, SRI. How are you capitalising on these?

Chair

Malik S. Sarwar  
CEO  
K2 Leaders

Speaker

Bryan Goh  
Executive Director, Chief Investment Officer  
Bordier & Cie

Jean-Louis Nakamura  
Chief Investment Officer, Asia Pacific - Chief Executive Officer, Hong Kong  
Lombard Odier

Rohit Jaisingh  
Head, Equity Investment Products  
DBS Bank

Tuck Meng Yee  
Partner and Founder  
JRT Partners

Marc Van de Walle  
Global Head of Products  
Bank of Singapore

Chee Loong Chong  
CEO, Singapore

Mercer

4.15pm

Panel Discussion

Product Manufacturers; What products do you have that you feel would be most valuable to HNW / UHNW clients in 2018?

- What funds / investment products have you got that are specifically relevant today to private banks and wealth managers?
- How can clients access China?
- How can clients access India?
- Active vs passive?
- What strategies will enable Asian investors get higher returns, whilst been mindful of potential market challenges in 2018?
- Where do you now turn to drive long-term returns for a portfolio?
- What is the increasing role of Physical Gold?
- What is your current thinking about the role of fixed income and credit in HNW / UHNW clients' portfolios?
- What are the prospects for US dollar interest rates in the coming 12 months? Is being small and flexible in fixed income critical at this point in the rate cycle?
- Can the higher yields available in particular asset classes insulate investors from rising official rates and still provide good returns?
- What are the available higher-yielding USD-denominated asset classes?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Robert Hordon  
Senior Fund Manager  
J O Hambro Capital Management

Tony Wong  
Head of Intermediary Sales  
CSOP Asset Management

Dimitry Griko  
Chief Investment Officer – Fixed Income  
EG Capital Advisors

Praveen Jagwani  
Chief Executive Officer  
UTI International

Adrian Chee  
Managing Director, Head of Portfolio Management and Credit, Asia  
Credit Suisse Asset Management

Heena Mayani  
Chief Compliance Officer  
Global Precious Metals

5.00pm

Closing remarks

Malik S. Sarwar  
CEO  
K2 Leaders  
Forum Ends

5.10pm