

Digital Wealth Asia 2017

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel Discussion

Does digital really matter to your success?

- How much of your revenue comes from digital channels?
- What does a proper business case for digital look like?
- There is a lot of talk – but how much gets converted into tangible and measurable action?
- What – if anything – has emerged from any of the Incubators, Labs and other initiatives?
- Why does it take so long to transform the business?
- How do you create an ecosystem that genuinely embraces fintech?
- How do you create value out of digital? Will this change?
- Who has created any real impact – and how did they achieve this?
- Who will be the Tesla of Asian wealth management?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Nakul Kurup
Head of Digital Sales & Monetisation
OCBC Bank

Alvin Lim
Head of Digital, Singapore
HSBC

Lee Ng
Vice President, MetLife Innovation Asia, and Chief Operating Officer of Lumenlab
MetLife

Yashesh M. Kampani
General Manager, Banking and Financial Markets, ASEAN
IBM

Mark Wightman
Partner, Wealth & Asset Management Advisory
EY

Speaker

9.55am Presentation
The future of investment advice

Mark Wightman
Asia-Pacific Wealth & Asset Management Consulting Leader
EY

- Financial well-being is becoming increasingly important given improvements in life expectancy, requiring greater planning. At the same time, there is a global shift in financial responsibility from the state to the individual, particularly around pensions, healthcare and education
- New generations are now more willing than ever to place their trust in non-traditional financial services providers; overall they have different needs, face more choice and are more transient
- In a world where there is greater access to information, digital innovation and breath of investment opportunities, who is best positioned to support investors' needs, and how can we work together to improve the financial well-being of everyone?

10.05am

Presentation
The quest for client loyalty and value: re-assessing the digital landscape

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

This will discuss what matters most to clients and how digital advancements are changing the way clients select wealth management providers. Mark will examine key priorities for the HNW digital experiences, gaps in delivery and where firms should direct efforts to demonstrate value and deepen client loyalty. The purpose of this presentation is to engage the audience on several levels:

- Define past, present and future view of the digital landscape
- Identify technology experiences that impact loyalty
- Strategise the areas of high-impact for technology focus to drive engagement and loyalty

10.15am

Presentation
Digital wealth: automation, deployment, engagement

John Robson
Chief Commercial Officer
Quantifeed

- A new digital wealth product begins with an idea – what idea is that?
- Working with multi-stakeholder institutions
- Learning, iterating and growing

10.25am

Presentation
Robo-advisory for a more efficient front-office

Mark Buesser
Chairman
IMTF

- Automating complex regulations

- Digitising the client relationship
- Achieving client centricity and efficiency with ICOS/2

10.35am

Refreshment & Networking

11.05am

Presentation

Differentiate your firm with world-class, innovative client communications technology

David Rhind

Regional Solution Manager, Asia Pacific

SS&C GlobeOp

- Empower your business teams to design and deliver high-impact, sophisticated communications
- Tailor your workflows to the specific needs of each communication
- Apply a comprehensive, flexible approach to data quality
- Enable multi-channel distribution - users control what they get and how they get it

11.15am

Presentation

Turning information into insights

Marko Milek

Head of Global Exchange, APAC

State Street

- If data is the next natural resource, how will investors best harness it?
- What analytical frameworks need to be developed?
- Why are actionable insights the ultimate goal?

11.25am

WealthTalk

Credit Suisse's successful digital transformation - a look back and ahead

- What does it take to be truly multi-channel digital?
- Where does Credit Suisse stand on its award-winning Digital Private Bank? And how is it used?
- Digitising one of the most 'cumbersome' processes in private banking: account opening
- How to digitise an RM's daily work?

Urs Lichtenberger

Managing Director - Head Client & Front Office Platform,

Credit Suisse Wealth Management

11.35am

WealthTalk

Let's get down to business

- Driving a digital business ("it's not a programme, it's a business")
- Placing the customer at the heart of what we do - how to embed a customer first mind-set into an organisation's DNA

Evy Theunis

Managing Director - Regional Head Customer Segment and Customer Science
DBS Bank

11.45am

WealthTalk

Enabling digital wealth options in Asia

- How to make digital wealth a reality within your institution?
- Options for different segments: account aggregation, robo-advisory, hybrid advisory, thematic investing options, Sharia-compliance
- Regulatory progress and constraints across the region
- Organisational constraints to overcome

Bhaskar Prabhakara
Founder & Chief Executive Officer
WeInvest

Aananth Solaiyappan
Chief Technology Officer and Co-Founder
WeInvest

11.55am

WealthTalk

Role of robo-advisors in banks - will the RM stay?

Chandrima Das
Chief Executive Officer & Co-founder
Bento

12.05pm

Panel Discussion

Let's stop talking about fluffy stuff - what is really happening?

- What do RMs actually use?
- What are you really doing?
- Where are you spending money on digital?
- Can you quantify what it does? What are the KPIs?
- What's the end-game – increase revenue? Drive new AUM? Spend more time with clients? Lead to an increase in sales?
- What's the business case?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Urs Lichtenberger
Director, Client Platform, Asia Pacific
Credit Suisse

Evy Theunis
Head of Wealth, Regional eBusiness Department, Consumer Banking Group
DBS Bank

En Lai
Head, Digital Strategy and Content, UBS Chief Digital Office, APAC
UBS Wealth Management

Smita Choudhary
Executive Director, Head, Digital and Business Transformation
Bank of Singapore

Urs Palmieri
Director, Financial Services Advisory, Performance Improvement Strategy
EY

Ryan Burdick
Senior Vice President, Global Head of Sales
Xignite

Speaker

12.50pm

Lunch & Networking

1.40pm

Panel Discussion

Is there a tangible role for robos and AI?

- Are robos gaining any real ground in Asian wealth management?
- Is it likely that the traditional investment process will change?
- What should be the role of a robo-adviser in today's market?
- Are the smart algorithms in the background driven by actual investment professionals or just tech kids in the garage?
- What are the lessons to be learned so far from elsewhere in the world?
- How should robos be regulated? And what impact will this have on their potential?
- What's the application of AI in robos?
- How will the impact of AI on the investment process? How will it evolve over time?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Bhaskar Prabhakara
Founder & Chief Executive Officer
WeInvest

Alex Ypsilanti
Chief Executive Officer and Co-Founder
Quantifeed

Chandrima Das
Chief Executive Officer & Co-founder
Bento

Artur Luhaaar
Chief Financial Officer & Co-Founder
Smartly

Duncan Klein
Head of Product Management
BondIT

Chia Wee Kee
Associate Partner
Synpulse

Speaker

2.25pm

WealthTalk

The fourth digital revolution in wealth management: information

- The financial institution that creates clients insights will be the winner in the future
- Why the currency of success is no longer investments products – but information

Michael Gerber
Chief Executive Officer
360F

2.35pm

WealthTalk

The emergence of hybrid advisory models

- What's the digital business model of the future?
- What's the evidence to support this?
- What should banks be doing to prepare and position themselves in line with these trends?

David Wilson
Senior Vice President
UOB Bank

2.45pm

WealthTalk

Using technology to bring institutional-level investing to everyone

- Currently, non-UHNWIs do not receive unbiased financial advice, and often face minimum balances, minimum investment periods, and high fees
- Now, technology can be used to transform investing so that we can (i) create sophisticated, personalised advice and portfolio management at a low cost, and (ii) distribute that advice and management through scalable, convenient, and user-friendly channels
- StashAway uses technology to bring institutional-level investment strategy and services to everyone, regardless of net worth or portfolio size, so that we can help them grow their wealth faster

Michele Ferrario
Co-Founder & Chief Executive Officer
StashAway

2.55pm

WealthTalk

Natural capital, blockchain, and the future of wealth management

- Investing in the world's most promising asset class
- Diversification and portfolio risk mitigation impacts
- Net positive portfolios

Alan Laubsch
Director, Natural Capital Markets
Lykke

3.05pm

Refreshment & Networking

3.30pm

WealthTalk

Rising trends in Asia family offices: digital revolution and opportunities

- Bridging wealth synergies across generations
- Technology evolution and what it means for wealth
- Creating a backbone for clients to consolidate all their financial requirements
- Opportunities for clients to access and manage their personal analytics

Shirley Crystal Chua
Founder and Group CEO
Golden Equator

3.40pm

Presentation
Breaking down silos in financial services

Benjamin Turner
Solutions Consultant and Product Management APAC
Liferay

- Silos exist in any organisation – and those organisational silos have historically given rise to technology silos; think the marketing department owning the website while the IT department owns internet banking, with each typically being implemented using different technologies
- Some of the challenges with siloed technology are inconsistent user experiences, inability to provide information that is contextually relevant, and so on
- In this session we'll demonstrate how customers have used Liferay Digital Experience Platform to enable co-operation between organisational silos and to implement solutions that break down technology silos

3.50pm

Presentation
9 basic steps towards TRM compliance

Sami Benafia
Head of Sales & Marketing
Ingenia Consultants

- An overview of the key areas in order to be compliant with both TRM Notice and Guideline, as well as the Guidelines on Outsourcing Managing data inventory, to help you develop risk management framework and a base for effective disaster recovery and business continuity management
- Perform responsible outsourcing to prevent financial loss, reputational damage and regulation breaches

4.00pm

Panel Discussion

How can you finally make use of your data?

- How do you convert your organisation to a data-first company?
- The banks are not big on data – should there be a role for data scientists?
- How do we bring data to life?
- What's the pitfalls for your business if you don't do this?
- With the world becoming increasingly volatile – how do you get the relevant inputs and make them mean something?
- How do you match up to what is important to people personally, and what are the consequences and impact on their view?

Chair

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Panel members

Charlie O'Flaherty
Partner
Crossbridge Capital

Michiel van Selm
Director - Director Customer Impact & Growth, Financial Services Industry Practice
PwC

Alex Medana
Founding Partner & Chief Executive Officer
FinFabrik

Vineet K Vohra, CFA
Director & Practice Leader
Arete Financial Partners

Joe Rothermich, CFA
Director, Data Science, Thomson Reuters Labs
Thomson Reuters

Speaker

4.45pm

Forum Ends