Digital Wealth Asia Forum 2019

8.35am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Keynote Address Stepping out of the box Bassam Salem Senior Adviser McKinsey & Company • Solving client pain points through digital innovation • Fixed costs vs variable costs: Rents and Salaries • Digital Channels of distribution • Data Analytics and monetisation
9.10am	Panel Discussion How can you boost efficiency and satisfaction by adopting Digital Wealth Management • What are the most important changes you have seen due to digitalisation? • How should banks decide what's working? What KPIs should we use? • What does the platform of tomorrow look like? • Do we focus on the technology without consideration of whether anyone wants to use it? • Digital tools provided to RMs for advisory – what has been the Banks' experience on the adoption and value add, and any challenges faced? • How can we improve the culture of innovation and change within Wealth Managers? • Is your Bank attractive enough for the new wealth creators and next generation of customers? • How can you accelerate the path towards digital private banking business models? • Revenue margins per clients will decline in the future. Is digital a way to stop revenue erosion and are Banks effective at monetising new digital services? • What is the future role of the RM when banks get digital? • Accelerating change: how can you overcome the barriers to successful transformation? Smaller boutique banks – how do they leverage technology? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Urs Lichtenberger Managing Director - Head Client & Front Office Platform, Credit Suisse Wealth Management

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

Jihyun Lee
Managing Director, Head IT Asia
Julius Baer

Dr. Silvio Struebi
Partner
Simon-Kucher Global Strategy Consultancy

10.00am	Presentation The Evolution of Advice

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

- Robo-advisors were considered to be a disruptor to the wealth management space but have failed to have the effects predicted
- Most robo-advisors have been sold to larger firms that can offer a full wealth management model with digital tools
- Digital transformation is happening rapidly in the wealth space as firms realize they must evolve their solutions and offer a "full service" approach to meet the needs of clients

10.10am	Presentation Regionalisation of Wealth Businesses – a Digital & Platform Perspective

Timothy Neville
Chief Executive Officer, APAC
FNZ

- One core platform multiple jurisdictions
- Multi channel, multi lingual, multi asset, multi currency
- Agility is critical – things are moving faster than ever

10.20am	Panel Discussion

Digital Banking and Wealth Management – what's next?

- What is the client experience that clients are looking for?
- How will digital banking evolve for HNW and UHNW clients?
- Are traditional wealth managers struggling to keep up with client expectations?
- How will new platforms impact the wealth management space?
- Are FinTech's and Tech Giants threatening our business model?
- Can new disruptor banks be successful? Are they really any different?
- What's next for these digital banks? How will this evolve in Singapore?
- Do people see a positive commercial effect? Will anyone make money and how?
- Is the cost of delivering financial advice and services reduced?
- How will clients transact, monitor portfolios, absorb investment ideas?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

David Wilson
Senior Vice President
UOB Bank

Nicolas Huras
Head of Sales and Relationship Management, APAC - UBS Fondcenter
UBS Asset Management

John Robson
Chief Commercial Officer
Quantifeed

Will Lawton
Independent
Acalution

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

Timothy Neville
Chief Executive Officer, APAC
FNZ

11.10am Refreshment & Networking

11.35am Presentation
Digital Client Onboarding

Amar Bisht
Head of Wealth Strategy and Advisory
Orbium

- Key challenges of onboarding
- Our point of view on combining client perspective, operational excellence and regulatory requirements
- Adopting an ecosystem approach

11.45am Presentation
How do you build value when clients want more than wealth? Findings from the 2019 EY Global Wealth Survey

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

- Turning client switching into an opportunity
- Delivering high-value solutions
- The evolution of digital advice
- Aligning pricing with value

11.55am	Presentation Making the impossible possible by mastering the behavioural science of clients' investment decisions Tatiana Collins Strategy & Consulting Director, APAC Wealth Industry lead Accenture • Making use of digital "crumbs" • Increasing the probability of leads conversion • Improving the relevance of investment recommendations to clients
12.05pm	Presentation 360F – Advisory Revised. The first Advisor based solution for holistic financial recommendations Michael Gerber Chief Executive Officer 360F • Holistic Financial Planning is not the goal – Recommending the right products by unbiased advice is the future • Machine learning and Data are just a vehicle for improving new business value and cross / upselling • Don't forget your existing customers
12.15pm	Presentation Smarter Humans. Smarter Machines. Patrick Donaldson Head of Customer Strategy, APAC LSEG • The devil is in the data: data quality is the biggest barrier to the adoption and deployment of machine learning. • AI will be the single greatest enabler of competitive advantage in the financial services sector • There is disparity in how technologies are being adopted and used around the world. Financial institutions in the United States and Canada are the front-runners; Asian institutions are more advanced than Europe in some areas, while Europe leads Asia in others.
12.25pm	Panel Discussion What's the impact of artificial intelligence (AI) and big data analytics? • What's the changing face of the customer? • What innovations could boost value propositions? • How can AI and Data save money or drive revenue? • How do you use data in a useful way? • From raw data to insights: how can banks make the leap? • Financial modelling, portfolio management and asset allocation: What's the role of AI in

the future?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Nakul Kurup
Vice President, E-Business - Global Consumer Financial Services
OCBC Bank

Michael Gerber
Chief Executive Officer
360F

Tatiana Collins
Strategy & Consulting Director, APAC Wealth Industry lead
Accenture

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

Ayla Kremb
Ecosystem Manager – Applied Innovation Asia, Refinitiv Labs
LSEG

1.10pm Lunch & Networking

1.50pm Workshop

Harnessing the full value of your research using data

Steven Carroll
Managing Director, ASEAN
LSEG

The next digital "arms race" will be around data. Just how do you process the ever growing amount of information and turn commoditised content into actionable insight? As an investment adviser or portfolio manager, how can you identify which sources to trust? This masterclass will use case studies from Starmine to show how building superior analytics can help better understand the investment landscape and ultimately provide your clients with improved signals that can help them achieve better performance and mitigate risk.

2.30pm Workshop

AI for investment research

Alpha Baid
Business Development
Stradegi Consulting

- Challenges working with traditional, unstructured and alternative datasets at scale
- Incorporating data science into the investment process
- Use case example: using AI to monitor and quantify the impact of critical events

3.10pm Refreshment & Networking

3.30pm Panel Discussion

The blockchain – what does that mean to you?

- Blockchain - what are the real applications and implications in financial services?
- Roadblocks/Challenges for great adoption in the capital markets?
- Dive into the Eco-system, what exists, what is being built, what is needed?
- How will affect the wealth management industry + Investment Opportunities?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Julian Kwan
Co-Founder and CEO
InvestaX

Antony Lewis
Director of Digital Assets
R3

Lawrence J Grinceri
Chief Executive Officer
Skyhook Capital

Alexandre Kech
Director, Blockchain and Digital Asset
Citi

4.30pm Forum Ends