Digital Wealth Forum Asia 2018

8.35am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion What is digitized advice? • How does digitization help drive advice and improve the relationship between the RM and client? • How do you ensure you are giving best in class advice across all markets and client segments? • How can you look through the client portfolio and offer better advice? • Can digital investment tools generate investment ideas for a client? • How does it save money or drive revenue? • How have you improved the middle and back office? • Do clients still want discussions about portfolios to be had with their RM? • How will new platforms impact the PB space? • Is Robo still a term that's mis-used? • What should the investment engine behind digitized advice be? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Paul Hodes Wealth Management Head Asia & EMEA UK Wealth Management Head Citi Private Bank Nick Hungerford Senior Advisor Portag3 Ventures Evy Wee Executive Director, Head of Digital Advisory & Portfolio Implementation, Regional Investment Product & Advisory DBS Bank Duncan Klein Head of Outbound Product Management BondIT John Robson Chief Commercial Officer Quantifeed
9.45am	Presentation

BlockChain, Predictive Analytics, Robo – evolving and applying within wealth management

Timothy Neville
Chief Executive Officer, APAC
FNZ

- How these technologies are practically being utilised (or intending to be utilised) within the wealth management sector
- How these technologies are evolving from their 1.0 versions
- What impact these technologies will actually have on our existing operating models.

10.05am

Presentation
Adapting Wealth Management for a BigTech World

David Wilson
Senior Vice President
UOB Bank

- The continued importance of hybrid advice
- Progress of wealth management firms' business model transformation
- BigTech – A threat or opportunity?
- Investing for an uncertain future

10.15am

Panel Discussion

What's next for digital in wealth?

- What new and interesting digital services are we likely to see in 2018?
- When will we move from 'digital lipstick' to real commitment?
- Digital tools provided to RMs for RM advisory – what has been the Banks' experience on the adoption and value add, and any challenges faced?
- What is the client experience supposed to look like?
- What are the lessons to be learned so far from elsewhere in the world?
- Does the cost of delivering financial advice and services needs to be reduced?
- Build it yourself or PLUG & PLAY?
- What's the impact of artificial intelligence (AI) and big data analytics?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Urs Lichtenberger
Managing Director - Head Client & Front Office Platform,
Credit Suisse Wealth Management

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

Damien Piper
Regional Director, Asia
InvestCloud

Thomas Achhorner
Global Head of Solutions
dnu-olddadditiv

Sandeep Mukherjee

11.00am Presentation
The Digitalization of Client On boarding: improve Customer Experience & Operational Efficiencies while reducing overall Compliance cost

Andreas Wenger
General Manager, APAC
IMTF

- Self Service or RM supported on boarding
- Main Compliance & KYC Challenges
- RegTech platform: ICOS/2

11.10am Refreshment & Networking

11.35am Presentation
Strategies for Enabling a Customer-First Digital Wealth Platform

Darryn Noble
Vice President, Sales Consulting
NEXJ Systems

- How to leverage CRM as part of a more strategic customer-first, digital wealth platform.
- Evolution of CRM, approaches to integration, strategies for data management, and the features you need to think about in order to truly differentiate your business.
- How firms can quickly leverage AI and machine learning as part of an intelligent customer management solution.

11.45am Presentation
The Four Waves of Agile

John Okoro
Head of Agile Practice
Orbium

In this session Orbium will present the four waves of Agile from single Agile / Scrum teams, to Agile Scaling, Business Agility and Digital Innovation. Understanding these “waves” is very key to banks charting their course and getting the most out of their Agile / Digital transformations.

12.00pm Presentation
Bringing Wealth Management Client Communications into the 21st Century

Shane Meredith
Regional Sales Director - Wealth & Advisory
SS&C GlobeOp

- Analog Wealth Management in a Digital Asia
- How to Communicate with today's Asian Based Clients
- Welcome to Digital Asia

12.15pm Panel Discussion

Demystifying all the hype

- Making sense of crypto and blockchain - what are the real applications & implications in financial Services?
- FinTech – What's working or not working?
- How are FinTech companies partnering with larger more established institutions?
- What makes these partnerships work - what both sides are looking to achieve?
- What has emerged from any of the Incubators, Labs and other initiatives?
- There has been lots of talk – but what's next?
- What's really under the lid? Is there any genuine innovation?
- Is China where we see the real innovation and opportunities?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Julian Kwan
Co-Founder and CEO
InvestaX

Navin Suri
Chief Executive Officer
Percipient

Seamus Donoghue
Vice President of Business Development
Allocated Bullion Solutions

Stanley Chao
Co-Founder and Head of Data Science
Red Pulse

Frank Henze
Practice Lead - Financial Services IT
Trimantium GrowthOps

1.00pm Presentation
Avoiding common Multigenerational Wealth Planning Pitfalls

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

- Looting the legacy
- Monarch to mentor

- Transactional traps
- Death and Divorce

1.10pm Lunch & Networking

1.50pm Presentation

Open banking: driving robo-advice opportunities to new heights

John Robson
Chief Commercial Officer
Quantifeed

- Open Banking - access and information, benefitting customers
- Quality information - quality advice, quality outcomes
- Creating more delightful wealth management experiences

2.00pm Workshop

Case Study: How Aviva drives digital wealth business growth with Data-Driven and Customer-centric approach

Rachel Chen
Head of Digital Wealth (dollarDEX)
AVIVA Navigator

- Customer Journey Mapping – Good customer experience happens by design but not by chance
- Data-based decision-making – Why it is important not to make assumption
- Test & learn – How can you implement changes quickly and best for clients

2.30pm Workshop

Data and the role data has in driving digitisation

Frank Henze
Practice Lead - Financial Services IT
Trimantium GrowthOps

- Evolution of digitisation in wealth management - what worked in the past
- Where digitisation occurs now and in future along the end to end business set up
- Importance of data to define the future of business design
- Data strategies to deliver value add services to client
- How do aspects like cloud computing and blockchain impact future business models

3.10pm Refreshment & Networking

3.30pm Panel Discussion

DIGITAL = Faster, cheaper and better wealth management

- What does the platform of tomorrow look like?

- Where are we with ROBO?
- What's the likelihood we can engage clients directly?
- What's your value proposition and why will it be successful?
- Have consumers, banks and consultants really embraced 'new stuff'?
- Who will rock the boat?
- Are traditional wealth managers struggling to keep up with client expectations?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Freddy Lim
Co-founder & Chief Investment Officer
StashAway

Kunal Bajaj
Head of Digital Wealth Management
MobiKwik

Tanmai Sharma
CEO and Founder
Canopy

Elena Okhonko
Independent Financial Adviser
Financial Alliance

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

Charlie O Flaherty
Partner
Crossbridge Capital

4.30pm	Forum Ends