HUBBIS INDIA WEALTH MANAGEMENT FORUM 2024

1.00pm	Lunch and Registration
1.55pm	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
2.00pm	Panel Discussion What themes will shape the industry in the next ten years? • How is the asset & private wealth management industry evolving? • What are the challenges? • How are client expectations evolving? • What growth potential lies ahead, and where are the key opportunities for the foreseeable future? What are your key priorities over the next 12-months? • How can you differentiate your offering? How can you redefine your proposition? Have you done anything innovative? • Fees, profitability, cost – what's the right business model? Chair Markus Grossmann Regional Managing Director Trident Trust Speaker Nakul Beri Senior Managing Director of Global Client Coverage and Origination Waterfield Advisors Shiv Gupta Founder & Chief Executive Officer Sanctum Wealth Anuj Kapoor MD & CEO – Private Wealth and Alternatives Asset Management JM Financial Harmeet Sahney Executive Director Avendus Wealth Management Amit Saxena Senior Managing Partner Nuvama Private
2.30pm	Presentation Wealth as a Service: Looking beyond the "Crazy Rich Indians" Yash Shah Partner

Synpulse

Global wealth managers are heavily investing with a laser focus on capturing the growing HNWI population in Asia's emerging markets. The local universal banks are revamping their client segments to provide tailored advisory services to the wealthy. But are the resources being allocated towards the correct target client base? Are we missing the accelerated growth of a particular wealth segment which will overshadow the HNWI wealth base in the near future? Let's look beyond Asia's crazy rich and understand how WMs are gearing up with innovative wealth operating models to capture, service and retain this underserved population.

2.45pm Panel Discussion

Evolving the Platform and Proposition

- How have you been evolving your platform, processes, and products?
- What are the changing expectations of clients?
- How does this help you in the curation and delivery of advice?
- Have you made any real progress in your digital journey?
- How does digital improve your traditional value proposition?
- What are the products and services you could offer? How can your proposition evolve?
- What is you view on separate platforms that offer wealth management - external to a bank?
- Superapp strategy for products and platforms – economies of scale and synergy
- How AI and predictive analytics with platforms can influence customers, create a “hooking” experience and build brands
- Evolving tech trends in products and platforms - Continuously changing Markets + competition and the platforms
- NextGen FinTech products and platforms through lenses of customer trust, regulatory landscape and legacy players

Chair

Yash Shah
Partner
Synpulse

Speaker

Virendra Somwanshi
Head - Wealth Management, Capital Markets and NRI
Bank of Baroda

Ashish Shanker
Managing Director & CEO
Motilal Oswal Private Wealth

Manish Kathuria
President and Business Head, Priority & NR Banking
Kotak Mahindra Bank

Bhushan Sonkusare
Chief Technology Officer
360 ONE Wealth

Gaurav Arora
Founder
Arthya Wealth and Investments

3.15pm Presentation

Leveraging Technology to Unlock Wealth Management Success

Abhra Roy
Senior Product Line Manager and Head, Finacle Wealth Management
Infosys Finacle

Get insights on how banks are harnessing the power of technology to seamlessly service, engage, and innovate better for their affluent customers. Learn how global banks are riding on the Finacle Wealth Management platform to deliver personalized services while simplifying and enhancing the wealth management journey for their valued clientele.

3.30pm Presentation
Portfolios in 2030 – Our view

Arvind Bansal
Executive Director - Head, Products & Advisory
Avendus Wealth Management

- Evolution of portfolio – 2000, 2010, 2023, 2030.
- Asset classes and product structures that will have a biggest positive and negative impact.
- Key requirements from various stakeholder which includes wealth managers, asset managers, regulator and tax.

3.45pm Presentation
Market Outlook & Key Insights on Equirus Long Horizon Fund

Viraj Mehta
Managing Director
Equirus Capital

- Market Cycles
- Starting valuation matters
- Sectors That We Like

4.00pm Refreshment & Networking

4.30pm Panel Discussion

Curating winning client portfolios

- What are the opportunities and challenges for the year ahead?
- How are you managing risk in 2023? Is it time to take on more risk?
- What's your favourite asset class now?
- How are you generating income for clients?
- What's your view on alternative investments? Digital assets? Private Markets?
- How do you choose the right investment partners?
- How can you consistently deliver performance and differentiate your offering?

Chair

Bryan Henning

SVP, Head of International
Eton Solutions

Speaker

Prashant Joshi
Co-Founder & Partner, Family Office Advisory
Upwisery

Devang Mehta
Director – Equity Advisory
Spark Capital Private Wealth Management

Dharmendra Jain
Executive Director & Head - Investment Products
Kotak Mahindra Bank

Onkarpreet Singh Jutla, CFA
Chief Product Officer
Nuvama Private

Bharat Pareek
Head - Products (Wealth)
ICICI Securities

5.00pm Presentation
Citizenship and Residency – Opportunities and Trends for the year ahead

Rohit Bhardwaj
Director Private Clients – India Team Head
Henley & Partners

- Alternative residences or citizenships in times of Political Uncertainty
- Domicile diversification – a new asset class
- Real estate investment rankings for migration

5.15pm Panel Discussion

Current Trends and Concerns for Indian Families

- What are the challenges and expectations of UHNW Indian Families today?
- How is the role of estate and legacy planning changing today?
- How do Indian families move money offshore today – especially now as there are so many very wealthy clients?
- How is philanthropy developing? Especially given the impact of changes in regulations.
- How do clients plan for their collectibles – like vintage cars and art? How do they structure these assets and who do they leave them to?
- How are trust disputes likely to play out in the future? What are the issues?
- Are families adequately prepared for the transition to the next generation?
- Are families taking any steps to evaluate the risks and consider solutions?

Chair

Pranav Khanna
Consultant
Trident Trust

Speaker

Bijal Ajinkya
Partner
Khaitan & Co

Sneha Makhija
Head of Wealth Planning
Sanctum Wealth

Sunita Singh-Dalal
Partner, Private Wealth & Family Offices
Hourani & Partners

Shweta Shah
Head Wealth Structuring & Estate Planning
Nuvama Private

5.45pm Presentation
Transforming a Family Office to Reimagine the Value it Delivers

Satyen Patel
Executive Chairman
Eton Solutions

- Setting up a family office to deliver scalable advantage for tomorrow
- Using technology to create operational leverage and efficiencies
- Digitalising governance functions within the Family Office and across family members and key advisors

6.00pm Panel Discussion

The Globalisation of Wealthy Indian Clients

- What are the current Trends and Concerns for International Families?
- We do love that term 'Family Office' – what does it even mean in reality?
- How do wealthy Indians structure their offshore wealth in a way away that is compatible with Indian tax and legal regulations?
- Whats the role of the UAE, Singapore and elsewhere? Which centres are likely to be most attractive in the future?
- Have families adequately considered transitioning to family offices – from operating wealth to investment wealth?
- How can you protect assets and wealth for the next generation?
- What are the trends around citizenship and migration?

Chair

Dominic Volek
Group Head of Private Clients and Member of the Executive Committee
Henley & Partners

Speaker

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Woon Shiu Lee
Managing Director & Group Head of Wealth Planning, Family Office & Insurance Solutions
DBS Private Bank

	Sean Coughlan Managing Director, Singapore Trident Trust
	Shreya Rao Partner AZB & Partners
	Sunita Singh-Dalal Partner, Private Wealth & Family Offices Hourani & Partners
6.30pm	Forum Ends