

# INDEPENDENT WEALTH MANAGEMENT FORUM – DUBAI 2024

8.30am Registration

8.55am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.00am Panel Discussion

The Evolution of Private Wealth Management in the UAE: The Opportunity & The Proposition

- What are the key trends and developments in the UAE and the broader Middle East private wealth management markets?
- How will the independent wealth management sector expand in the years ahead?
- Which types of independent wealth firms are already established in the UAE, who are emerging as new competitors, either from within the region or from overseas, and why?
- Broadly, who are the key local/regional and international clients, and what specific requirements or expectations do each of these types of clients have?
- What are the challenges?
- How do traditional private wealth managers, such as international or local Private Banks, view this development? Will they collaborate or compete?

Chair

Mark Smallwood  
Engagement & Consulting Partner  
Hubbis

Speaker

Michel Longhini  
Group Head of Global Private Banking  
First Abu Dhabi Bank

Navin Chokhani  
SVP & Head of Client Value Management Private Banking  
Mashreq

Damian Hitchen  
Chief Executive Officer, MENA  
Saxo

Stuart Ritchie  
Managing Partner  
GSB Capital

9.30am Presentation  
Transforming a Family Office to Reimagine the Value it Delivers

Bryan Henning

SVP, Head of International  
Eton Solutions

- Setting up a family office to deliver scalable advantage for tomorrow
- Using technology to create operational leverage and efficiencies
- Transformative impact of AI on family offices

9.45am

Panel Discussion

Growing the Independent Wealth Ecosystem

- Who do you partner with for success? Platforms / Investments / Tech / Professional Services
- Execution and Custody - What are the choices?
- How is the ecosystem evolving? - What does the independent sector need from the broader financial and wealth management ecosystem in the UAE? Is it more products, more local booking and custody, more EAM-centric desks and services, a bigger array of quality fund houses, more global-brand life insurers and specialist brokerages, more regulatory liberation, more clearly directed support from the regulators, or all of the above?
- Other more mature EAM markets such as Singapore & Hong Kong have an industry "Association" – do we think an industry association would be useful in Dubai / UAE?
- Is there enough talent in the market, being nurtured locally, or is the UAE market capable of attracting high-quality talent from established overseas markets?
- What are, or what could be, the key appeals of the UAE's independent wealth sector for global clients compared with, for example, Singapore's now highly evolved wealth market?
- With which markets and regions are there areas of potential connectivity and collaboration, such as Asia including India, Europe especially Switzerland, or the US?
- What are the three key developments the panel members would like to see on the wish list to help develop the independent wealth sector in the UAE?
- What might the independent wealth market in the UAE look like by 2030, and why?
- What do RMs and advisors at the independent firms need to demonstrate to win and retain private HNW and UHNW clients?
- What are the lessons learnt by an EAM in Singapore?

Chair

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

Speaker

Urs Brutsch  
Managing Partner & Founder  
HP Wealth Management

Biju Thomas  
Senior Director & Head of Family Office for Mashreq Private Banking  
Mashreq

Noor Quek  
Founder & CEO  
NQ International

Jyoti Keshavan  
Founder & Chief Executive Officer  
Xanara

10.15am

Presentation

Wealth Infrastructure in a Box: The Key to Becoming Future-Proof

Srutaban Mukhopadhyay  
Chief Product Officer  
Valuefy

- Future-Proofing Wealth Technology with Product DNA
- Elevating Client Experience and Engagement
- Empowering Advisors Through Technology

10.30am

Presentation

Unlocking Customer Confidence: Improve Onboarding and Boost Your Revenue by Leveraging Educational Analytics

Erik Brodin  
Product Development and Sales Specialist Director  
Kidbrooke

- How to streamline the onboarding process for your client's employees by balancing digital and hybrid elements of the experience
- How integrating educational analytics can significantly boost revenue by increasing customer confidence during onboarding for occupational pensions
- How financial analytics can empower customers and advisers alike, achieving a more cost-efficient financial planning process

10.45am

Panel Discussion

Defining the Business – Engaging the Right Tools to Drive Efficiency and Evolve the Proposition

- What are the key qualities and characteristics that independent firms should project?
- How are you differentiating yourself? And the strategy to attract clients and RMs?
- How are independent wealth managers evolving? How will they grow? What are they doing to stay ahead of the curve?
- What is the nature of a sustainable platform? And the challenges of creating a successful and profitable business?
- A pre-event survey of the market highlighted how EAMs and MFOs are mainly focusing their digital investments on the client-facing end of their offerings. Why should this be?
- What are the competitive risks of failing to procure these solutions, and what are the potential rewards?
- Where is the UAE's independent wealth sector in its front-end digitisation journey?
- Why is personalisation so much more important today than the broad-brush, more traditional and standardised approaches of the past?
- What digital tools and solutions are out there to help with RM productivity, CLM, CRM, portfolio management and reporting protocols?
- How can data management and analytics help to elevate the skills, capabilities and productivity of the RMs and advisors?
- How do you balance and align technology and human interaction for optimum client outcomes?
- The challenges around harnessing technology and automation to improve the client proposition and boost client retention, as well as to help increase AUM and revenues?
- What is coming next that the independent sector might think about?

Chair

Bryan Henning  
SVP, Head of International  
Eton Solutions

Speaker

Dean Kemble  
Chief Commercial Officer  
GSB Capital

David Doerig  
Chief Operating Officer  
Corecam

Anmol Budhraj  
Founder and CEO  
Three Comma Capital Advisors

Erik Brodin  
Product Development and Sales Specialist Director  
Kidbrooke

11.15am

Refreshment & Networking

11.45am

Presentation  
2024: A Year of Normalization and a Nice Tailwind for Credit

Romain Miginiac  
Fund Manager and Head of Research  
Atlanticomnium

- Opportunities and challenges in the fixed income and credit markets
- Financials in a sweet spot
- What could challenge this narrative?

12.00pm

Presentation  
Time to Go for Bargain Hunting in China?

David Lai  
Partner & Co-CIO  
Premia Partners

- Are we at the bottom yet – is deep value cheap enough?
- The next China is China - what does this mean and what are the important emerging trends to monitor?
- Where will you find value and value for growth in the next 12 months
- Which ETFs are the best implementation tools?

12.15pm

Panel Discussion

Independent Wealth Managers and the Delivery of a Client-Centric, Truly Objective Investment Proposition

- HNW and UHNW clients, first and foremost, select a private wealth manager for their investment management offering. What does the independent wealth community in the

UAE offer these clients today, and is it good enough?

- What does the panel think should happen in order to improve the investment proposition? Do they require better offerings and services from the private banks? Do they need to work closer with the independent digital investment platforms? Should there be further liberalisation from the regulators? Is a deeper and more diverse fund house ecosystem needed?
- Are the independents in the UAE providing transparency and cost-effectiveness around their investment offerings, or is it still a case of the 'old' days and ways of hidden fees and a lack of objectivity and limited client-centricity? What could or perhaps should change?
- Can the independents make money and thrive from delivering an advisory-led investment offering, or is it product-led advisory at best?
- Is there a viable discretionary portfolio management market emerging in the broader wealth market in the UAE, and if so, how can the independents grab a share of that market?
- Is there enough talent available locally or that can be sourced to cater to the global expectations of the clients?
- What are the key differences in needs or expectations of local/regional HNW/UHNW clients and international clients?
- What are the key differences in the needs or expectations of HNW and UHNW/single-family office clients?
- Execution and Custody - What are the choices today and what developments lie ahead?

Chair

Philip Rosenberg  
Managing Director and Head of Distribution - Middle East  
GAM Investments

Speaker

Jonathan Paul  
Co-Founder & CEO  
Adatos

Arjun Mittal  
Founder & CIO  
Abbey Road Investment

Tommaso Leodari  
CIO  
Index & Cie

Fadi Barakat  
Chief Investment Officer  
REYL Intesa Sanpaolo

12.45pm

Presentation  
Mega-Investing Opportunities in India

Anshu Kapoor  
President & Head  
Nuvama Asset Management

- Why are Global investors under-allocated to India?
- Beyond equity markets – what opportunities exist in private equity, commercial real estate and infrastructure?
- Nuvama Asset Management, a new breed of asset manager, with a credible track record. How are you enabling Family offices and private wealth managers access these opportunities?

1.00pm

Presentation  
Vietnam - Asia's Next Tiger Economy

Eric Levinson  
Deputy Managing Director, Head of Business Development  
VinaCapital

- Why Vietnam Now?
- Key Themes
- Valuations

1.15pm

Lunch & Networking

2.00pm

Forum Ends