Indian Wealth Management Forum 2018

8.40am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

A rapidly evolving wealth management offering in India

- Is the euphoria in the wealth management business justified?
- Where will the continued growth come from?
- What are your priorities?
- What is your client acquisition strategy?
- How have you built a unique value proposition? What do you stand for?
- How can you increase your Net Income?
- How can you future-proof your business model?
- How do the different players – private banks, banks, family offices, IFAs. compete or complement each other?
- What changes are we seeing in client expectations and behaviour?
- Talent acquisition and retention – a big problem?
- Regulation and compliance – what are the challenges?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Nitin Singh
Managing Director & Head Wealth Management, India
Standard Chartered Bank

Feroze Azeez
Deputy CEO
Anand Rathi Wealth

Anshu Kapoor
President & Head
Nuvama Asset Management

Abhijit Bhave
Managing Director and CEO
Karvy Private Wealth

Atul Singh
Founder & Chief Executive Officer
Validus Wealth

Satheesh Krishnamurthy
EVP & Head - Private, Premium Banking & Third Party Products

Axis Bank

Anupam Guha
Head of Private Wealth Management & Equity Advisory Group
ICICI Securities

Sandeep Jethwani
Managing Partner & Head - Advisory Group
360 ONE Wealth

9.55am	Presentation Wealth Management in India: New Opportunities & Challenges Himanshu Bhagat Head Wealth Management Julius Baer
10.05am	Presentation Reimagining Wealth Management for the Digital Age Sandeep Lalwani Executive Director – Europe and APAC EbixCash Financial Technology • The Winds of change in Wealth management • The Omni Channel Myth • The Reimagined technology • Digital Push
10.15am	Head - to - Head Q & A Our journey in the wealth management industry Himanshu Kohli Founder Partner Client Associates • Why is Client Associates (CA) a pioneer in the Family office space in India? • To what extent are you professionals and entrepreneurs? • What’s next for you and the team?
10.25am	Presentation Enabling business efficiency by digitization Deepak Khurana Head of Business Development – Buyside, South Asia Thomson Reuters • Empower Private Bankers with state-of-art digital resources for being more informed of markets and customer portfolios; help them improvise on customer engagement & services • Help investors to gain more insights to their portfolios and market developments concerning them

10.35am

Presentation
Sensex 38000 – Invest or Divest?

Rajesh Kothari
Founder and Managing Director
AlfAccurate Advisors

- Sensex Earnings vs Market cap growth
- Divergence in trends
- Earnings – a reality check
- Identification of right themes and stocks critical to deliver performance

10.45am

Presentation
Transforming Wealth Management for the Future

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

- Keeping pace with the digital wealth wave
- Redefining wealth management for 2019 and beyond
- Future proofing your capabilities with a digital platform

10.55am

Refreshment & Networking

11.25am

Presentation
Re-engineering the wealth management model for foreign banks in India?

Atin Kumar Saha
Managing Director & Head Wealth Management Coverage, India
Deutsche Bank Wealth Management

- Play to their global strengths of investment banking & wealth client networks.
- Increase commitment to onshore business through increased capital, headcounts and moving up the product / client risk hierarchy.
- Remain holistic, unbiased, quality wealth advisors.

11.35am

Presentation
Accessing the offshore market for your Priority and HNW customers

Philip Story
Senior Executive Officer and Head of Distribution EMEA
Investors Trust

- Creating value offshore
- Exploring the challenges and opportunities of offshore investing
- Utilising technology and passive investing to drive better customer outcomes

11.45am Head - to - Head Q & A

Simplifying HNW Insurance to make it a success for all

David Varley
Chief Partnership Officer - Brokerage, International HuBS
Sun Life

- Why should someone take our HNW Insurance?
- What are the HNW Product options available in the market?
- What needs do they meet?
- What are the most popular products and why?
- Do you see a change in the market coming?
- Why should Bankers and Financial Advisers be interested in HNW Insurance?

11.55am Presentation
Current Wealth Management Trends

Irene Lee
Business Development Director, Intermediary and Partnership
Hawksford

- Overview - India in General; GDP and Growth
- Updates on Singapore and Hong Kong as Wealth Management Centres
- Brief Updates on CRS and AEOI
- Tax Compliant Estate Planning Tools

12.05pm Presentation
Driving innovation in Wealth Management

Anshu Kapoor
President & Head
Nuvama Asset Management

- Potential size of wealth management opportunity in India
- Trends and opportunities
- Creating a differentiated offering

12.15pm Panel Discussion

Dealing with wealthy Indian Families

- What's the increasing importance of wealth solutions and planning?
- What challenges do Indian business families have and how is that changing?
- How do they protect their assets?
- How do they deal with family succession?
- What are the effects of transparency on the conversation with clients?
- How can you have a proactive, sensible and sensitive conversation around wealth solutions with clients?
- Migration to different Jurisdictions – comparatively where is best?
- Philanthropy and Giving in India – what trends are we seeing?
- Family & Business Governance – any important developments?
- The next generation is increasingly important. How do we make the most of this

opportunity?
- What's the future for International Financial Centres?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Bijal Ajinkya
Partner
Khaitan & Co

Arpita Vinay
Managing Director and Co-Head
Centrum Wealth

Amrita Farmahan
MD and CEO, Wealth Management
Ambit Private Wealth

Richard Nunn
Regional Head, East
Jersey Finance

Vinita Iyer
Senior Vice President- Estate Planning
360 ONE Wealth

1.05pm Lunch & Networking

1.50pm Room A – Workshop

From technology to customer experience

- Consumer scenario
- The quest for innovation
- Launch of the video account statement
- The results

Deepali Naair
Senior Partner & Head – Marketing
360 ONE Wealth

1.50pm Room B – Workshop

Winning Strategies

- Risk management critical for long term outperformance
- AAA's 3M Investment Approach for identification of winners
- Importance of Exit Strategy

Rajesh Kothari
Founder and Managing Director
AlfAccurate Advisors

2.10pm Room A – Workshop

Challenges arising from the UK Criminal Finances Act 2017

- The new Corporate Offences of Tax Evasion
- The Statutory Defence of 'Reasonable Procedures'
- Unexplained Wealth Orders

Gez Owen
General Counsel and Head of Content
Hubbis

2.30pm Room A – Workshop

Cutting-edge Investment Frameworks

- Investment Frameworks (IFs) give investors an analytical advantage over the market
- Unlike stock and sector analysis, IFs are timeless and geography-agnostic
- Deep understanding, disciplined application and continuous improvement of IFs will deliver superior investment returns

Shrinath Mithanthaya
Senior Equity Analyst
Motilal Oswal Asset Management

2.30pm Room B – Workshop

Risk Management for Family Offices

- Capabilities at family office level
- Tools, parameters, measures for active monitoring
- How we add value

Alok Saigal
President & Head
Nuvama Private

Salil Thanawala
Principal Partner
Edelweiss Private Wealth

3.10pm Refreshment & Networking

3.30pm Panel Discussion

Building the investment capability and refining the wealth management proposition

- What's your investment process and philosophy?
- What does the word 'advice' mean to you?
- How are you relevant to your clients today?
- Do you deal with your clients in a transparent and consistent way?
- Recent trends in the wealth management industry in India – how have they affected you?
- Investments through traditional products or AIF? Is growth in AIF driven by real client need or opaque commission structure?
- How are you thinking about fund selection and portfolio construction?
- Where do you now turn to drive long-term returns for a portfolio?
- Open architecture – myth or reality?
- Do you really deal with the risk in clients' portfolios?
- What investment themes make most sense today?
- How are Indian clients broadening their investment horizons?
- The sales process and suitability – any issues that need to be addressed?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Prateek Pant
Co-Founder and Head of Products and Solutions
Sanctum Wealth

Gaurav Arora
Chief Investment Officer
Religare Private Wealth

Pranab Uniyal
Senior Vice President, Product Head - PBG Investment
HDFC Bank

Vinay Bajpai
Managing Director - Coverage & Advice
Deutsche Bank Wealth Management

4.15pm Panel Discussion

Does TECH / DIGITAL = Faster, cheaper and better wealth management?

- How important is digital today?
- How is it developing in India today?
- What's the likelihood of the traditional wealth managers being challenged by a digital alternative?
- How do asset management companies use digital? How does it help with client education? Improve the client experience? Enable you to connect with Millennials? Broaden distribution?
- How does technology help with the investment process?
- Is it possibly to deliver Digital Advice?
- What is a Digital Robo-Advisory Platform?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Erdem Ozgul
Managing Director
Numerix

Kunal Bajaj
Head of Digital Wealth Management
MobiKwik

Sharad Singh
Chief Executive Officer
Valuefy

Aditi Kothari
Head of Sales & Marketing
DSP Investment Managers

Aniruddha Chatterjee

Head of Buyside & Exchanges
Thomson Reuters

Abhishek Chandra
Partner, Head – Technology
360 ONE Wealth

5.00pm Presentation
Time and Money

Aashish Somaiyaa
Chief Executive Officer
Motilal Oswal Asset Management

- Why do investors redeem?
- What advisors can do to influence behaviour
- Why this “rhetoric” is unlikely to work – investors will make the same mistakes!!!

5.10pm Forum Ends