INDONESIA WEALTH MANAGEMENT FORUM - 2023

8.30am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion Wealth Managers - Survive and Prosper in the new world • How is the asset & wealth management industry evolving in the local market? • What are the trends and developments we are seeing in Asian private wealth management? • What growth potential lies ahead, and where are the key opportunities for the foreseeable future? • Fees are being pushed down by investors and regulators – how will wealth managers survive? • What has to change in the industry if it is to survive and prosper? Chair Dr. Silvio Struebi Partner Simon-Kucher Global Strategy Consultancy Speaker Meru Arumdalu Head of Wealth Management Standard Chartered Bank Yulius Ardi Head Of Wealth Management Bank Danamon Antony Dirga President Director Trimegah Asset Management
9.30am	Presentation Wealth as a Service: Looking beyond the "Crazy Rich Asians" 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.

9.45am

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?
- What do you think about digital assets?

Chair

Pieter Zylstra
General Manager - APAC
additiv

Speaker

Samdarshi Sumit
President Director & CEO
PFI Mega Life Insurance

Sigit Prihatmoko
VP
Bank Negara

Yash Shah
Partner
Synpulse

Ivan Kusuma
Head of Investment & Insurance
DANA

10.15am

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

Ian Horsburgh
Country Head of Indonesia
Henley & Partners

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

10.30am

Panel Discussion - in partnership with Henley & Partners

Current Trends and Concerns for International Families

- How do you use offshore wealth structures? What are some of the risks?
- How can you protect assets and wealth for the next generation?
- What will be the effect of CRS?
- What is the effect of beneficial ownership transparency?
- Which centres are likely to be most attractive in the future?
- What is the difference between a will and trust in Singapore?
- What are the trends around citizenship and migration?

Chair

Scott Moore, IMCM
Managing Director
Henley & Partners

Speaker

Dionisius Damijanto
Business Tax Partner, Financial Service - Indonesia
Deloitte

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

Ian Horsburgh
Country Head of Indonesia
Henley & Partners

11.00am Refreshment & Networking

11.30am Presentation
Growth of digital wealth management

Pieter Zylstra
General Manager - APAC
additiv

- Indonesia millennial investors
- New requirements from digital natives investors
- Future opportunity Wealth Management as a Service

11.45am Presentation
China reopening and framing for 2023 opportunities in China and ASEAN

David Lai
Partner & Co-CIO
Premia Partners

- Where are we in China's reopening trajectory, from business fundamentals to evolution of investor flows and allocations?
- Tactical and strategic bets – why are policy supported sector leaders well placed to outperform?
- Investment case and tailwinds supporting emerging ASEAN as the natural beneficiaries of China recovery and source of uncorrelated returns.

12.00pm	Panel Discussion

Curating winning client portfolios following a challenging year

- 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

Benjamin Twoon
Co-founder and Chief Commercial Officer
Alta

Speaker

Alain Tandi
Head, Bancassurance & Investment Management - Indonesia
Maybank

Guntur Putra
President Director, CEO
Pinnacle Investments

Radek Jezbera
Co-Founder & Chief Executive Officer
Kilde

12.30pm	Presentation Beneficial Ownership public access and the consequences for you

Zac Lucas
Partner – International Private Wealth
Spencer West LLP

- What will this mean for you and your clients?
- Timeline to implementation
- Alternative Jurisdictions

12.45pm	Presentation Proven strategy for driving revenue growth across digital channels

Dr. Silvio Struebi
Partner
Simon-Kucher Global Strategy Consultancy

- How do winning customer propositions look like in the future across retail wealth management?
- How do we use dynamic pricing as a growth strategy in wealth management?
- How can you better delight customers across digital channels and increase conversion?

1.00pm	Lunch & Networking
2.00pm	Forum Ends