MALAYSIA WEALTH MANAGEMENT FORUM 2023

8.30am	Registration
8.55am	Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

What are the issues Effecting HNW and UHNW Clients in Malaysia

- What are the current Trends and Concerns for International Families?
- 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 are the trends around citizenship and migration?
- How are wealth managers evolving their offering beyond traditional wealth management to offer a wider range of financial solutions. Maybe to include insurance, and wealth planning services?
- When is it appropriate to use a Reserved Powers Trust? When is appropriate to use a private trust company?
- How do you assess a trustee? Which is the right one? Bank owned, private, private equity owned, publicly listed?

Chair

CheeMee Ho
Director, Head of Malaysia
Henley & Partners

Speaker

Nor Fazlina Binti Mohd Ghouse
Chief Executive Officer
Maybank Trustees

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

Woon Hum Tan
Partner, Head of Trust, Asset & Wealth Management Practice
Shook Lin & Bok

Reuben van Dijk
Director
Melbourne Capital Group

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

Yash Shah
Partner
Synpulse

Speaker

Calvin Goon
Head of Wealth Management
Affin Bank

Wai Ken Wong
Country Manager, Malaysia
StashAway

Alvin Tan
Chief Executive Officer
UOB Kay Hian Wealth Advisors

Andrew Hendry
CEO Asia
Janus Henderson Investors

10.15am

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

Rory McDaid
Managing Director Private Clients

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 Presentation
Maximizing Returns through Efficient Post-Trading Services: Strategies for Wealth Managers

Lukas Conrad
Regional Head Securities Services APAC
SIX

- Optimize Returns; Improve portfolio performance through automated tax reclaim services.
- Secure Market Access; Accessing global markets through a reliable intermediary.
- Access to a variety of Investment Funds; Diversification is key.

10.45am Presentation
Growth of digital wealth management

Victor Wongsonegoro
Head of Sales Asia Pacific
additiv

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

11.00am Refreshment & Networking

11.30am Presentation
Customer-centricity in wealth management: lessons learned

Grzegorz Prosowicz, Ph. D
Head of Consulting and Product Management
Comarch Capital Markets

- Banking today and tomorrow: what does make banks privileged?
- Personalization in practice.
- How to create value and drive customer loyalty?

11.45am Head - to - Head Q & A

Krzysztof Maurer
Managing Director - Thailand
Comarch

- How are wealth managers enhancing their digital capabilities?
- What are some of the trends we are likely to see in the Post-covid world?
- How does Comarch help with the process of digital transformation?
- What is the strategy of Comarch for freeing up the RMs?
- How does Comarch approach customization of the wealth management platform to fit the needs of each client?

12.00pm

Panel Discussion

Curating winning client portfolios following a challenging year

- What are the opportunities and challenges for the year ahead?
- What is the outlook for the local economy?
- 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

Rossen Djounov
Global Head of Distribution and Client Solutions
GAM Investments

Speaker

Shin Seong Ng
Head, Investments Strategy & Advisory
Standard Chartered Bank

Shan Saeed
Global Chief Economist
IQI Global

Wendy Chen
Senior Investment Analyst
GAM Investments

Chi-cheun Teh
Former CEO & Managing Director, BOS Wealth Management Malaysia
Impian Sehasrat

Lee Lian Foo
Managing Director, Fund Management
Alta

12.30pm

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

Laura Lui
Partner & Co-Chief Investment Officer
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.

12.45pm	Presentation Active investing on the rocky path of US-China relations Wendy Chen Senior Investment Analyst GAM Investments • The most crucial bilateral relation: expanding arena vs. ongoing crisis-management • Investment in the US: bipartisan consensus on reinforcing US competitiveness • Investment in China: from domestic replacement to resuming global role
1.00pm	Presentation CitadelPay and the evolving digital wealth space Syaiful Riezal Ahmad Director & CEO Citadel Pay • Evolution of traditional wealth management solution to digital platforms • Increased digital familiarity of clients • Citadel Pay as a unique platform to provide and promote wealth management solutions
1.15pm	Lunch & Networking
2.00pm	Forum Ends