Malaysian Wealth Management Forum 2018

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel Discussion

A rapidly evolving wealth management offering in Malaysia

- How do the different players – wealth management, insurance and banks compete or complement each other?
- Asset management companies - growing well, broadening distribution and improving processes?
- How important is digital today?
- Offshore / onshore. Where is the long-term opportunity?
- Who is making a commitment to building an onshore business and why?
- Is there a hybrid model where international banks can work with onshore banks?
- What changes are we seeing in client expectations and behaviour?
- Where will the continued growth come from and what are your priorities?
- Are more advisory firms adopting a fee-based concept instead of product based selling?
- How is Malaysia continuing to develop as a centre of excellence for Islamic wealth and asset management?
- How would the Common Reporting Standards (CRS) and Automatic Exchange of Information (AEOI) affect HNW Malaysian clients having offshore accounts?
- Where can we find talent?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Pramod Veturi
Managing Director & Head, Wealth Management
Standard Chartered Bank

Lin Wein Khoo
Head of Private and Priority Banking
Techcombank

Edmund Lim
Executive Director - Wealth Management
Swiss-Asia Financial Services

Kimmis Pun
Managing Director, Head of Private Banking, Singapore
VP Bank

Hasham Esmail Piperdy
Chief Executive Officer, Malaysia

Mercer

9.55am Head - to - Head Q & A

Recent Trends and Developments in Investor Migration

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

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

10.10am Presentation
"Amazon-style" Banking Experience

Yvonne Mok
Director of Sales, Asia Pacific
Appway

- What is the general impression of online banking?
- What is "Amazon-style" Banking Experience?
- Amazon tech style vs. Starbucks experience in banking

10.20am Panel Discussion

TECH / DIGITAL = Faster, cheaper and better wealth management

- Is building digital distribution important?
- Will all the bank branches disappear?
- Build it yourself or PLUG & PLAY?
- What digital trends are we seeing elsewhere?
- Which technology solution provider do I choose?
- What are the consequences of not doing enough or anything?
- What is the client experience supposed to look like?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Ming Hui Yap
Founder & Managing Director
Whitman Independent Advisors

Kelvin Lim
Head of Business Development, Asia
IRESS

Namit Khanna
Sales Director - SEA & India
InvestCloud

Dominic Gamble
Head of Asia Pacific
Wealth Dynamix

11.00am

Presentation
Current Wealth Management Trends

Irene Lee
Business Development Director, Intermediary and Partnership
Hawksford

- Overview - Asia 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

11.10am

Refreshment & Networking

11.35am

Presentation
Whats the growing relevance of Gold within wealth management in Asia?

Martin Huxley
Global Head of Precious Metals
StoneX Financial Inc.

- Key findings that we discovered in the recent survey we did?
- What are the risks to avoid?
- Where is the opportunity for you?

11.45am

Presentation
How to use Structured Investment Solutions in a changing market

David Meier
Director, Sales - Structured Solutions
Leonteq

- A suitable solution for each market conditions
- Benefit from market volatility
- A great diversification tool

11.55am

Presentation
Emerging Trends in Portfolio Advisory

Alvin Lee
Managing Director, Head of ASEAN Account Management
IHS Markit

- Systematic approach to discussing market scenarios
- Handling of structured products
- Address questions on impact and sustainability of product ideas

12.05pm	Head - to - Head Q & A Platforms helping put together a successful Wealth Management proposition Manoj Prajapati Head of Sales, South Asia Allfunds • How does the platform work? • How do asset managers find value by using a platform like yours? • Real headaches you see for client and how can platform solve some of the problems • Can you share your experience of how fund distribution has evolved elsewhere? For example in the Middle East
12.25pm	Presentation Relationships & How to Build Them David MacDonald Head of Learning Solutions Hubbis • Augment your reality • The human advantage
12.40pm	Presentation Private Banking into the Future: What's the latest trend of private banking in Asia? Kimmis Pun Managing Director, Head of Private Banking, Singapore VP Bank • What are the some of the trends we are seeing today in Asian Private Banking? • How are the needs of wealthy clients in Asia changing? • What are the challenges that the industry faces today? • How will the investment offerings change in the next few years?
1.00pm	Presentation Successful Wealth Preservation across Generations Richard Chow Group General Manager Pacific Trustees • Circumvent pressure and reduce uncertainty for business owners and families • Strengthen stakeholder confidence • Improve employee morale • Prevent significant business interruptions
1.10pm	Lunch & Networking

1.50pm Room A – Workshop

Creating Operational Efficiency & Scalability across Distribution Network

- Role of Digitalization
- Increasing importance of Aggregator and their acceptability in Europe

Manoj Prajapati
Head of Sales, South Asia
Allfunds

1.50pm Room B – Workshop

The World's Leading Residence - and Citizenship-by-Investment Programmes

- Overview of Immigration programmes
- The leading Citizenship-by-Investment Programmes in the Caribbean
- European Citizenship-by-Investment in Malta and Cyprus
- Attractive European Residence-by-Investment Programme

CheeMee Ho
Director, Head of Malaysia
Henley & Partners

2.30pm Room A – Workshop

The Opportunities of Advisor-Driven Online Wealth Management Business

- The threats of internet ventures to wealth management industry
- Empowering wealth management using internet technology: More affordable, more convenient, more accessible
- The client experience of advisor-driven online wealth management business
- The benefits of advisor-driven online wealth management business to the wealth management companies
- Robo advisor vs. advisor-driven online wealth management

Ming Hui Yap
Founder & Managing Director
Whitman Independent Advisors

2.30pm Room B – Workshop

"Amazon-style" Banking Experience in Action

- How does the "Amazon-style" experience apply to banking?
- What are the major items for consideration?

- Seeing the "Amazon-style" experience in action

- Hand-on experience

Felix Kan
Head of Professional Services APAC
Appway

2.50pm 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

3.10pm Refreshment & Networking

3.30pm Panel Discussion

Investment Opportunities and Challenges – 2H 2018

- Are Malaysians becoming more international in our investment thinking?
- How are regional wealth managers changing their investment platform and proposition?
- What products do you have that you feel would are most valuable to clients in Malaysia today?
- What are your best and worst predications for 2H 2018?
- What potential strategies will enable investors get higher returns today while controlling risk?
- Where do you now turn to drive long-term returns for a portfolio?
- How do you best access China opportunities?
- What's the increasing role of Physical Gold?
- How will you help clients shift mindset, investing style and portfolio holdings as the market transitions to a more volatile end-of-cycle phase?
- Active vs Passive
- Opportunities in structured products 2H 2018?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Shan Saeed
Global Chief Economist
IQI Global

David Meier
Director, Sales - Structured Solutions
Leonteq

Martin Huxley
Global Head of Precious Metals
StoneX Financial Inc.

Carmen Cheung
Head of ETF & Index Team
Samsung Asset Management

Michael Chang
Chief Investment Officer, Fixed Income
RHB Asset Management

Valentin Laiseca
Head of ASEAN Index Sales
MSCI

4.30pm	Forum Ends