Full Agenda - Middle East Wealth Management Forum 2018

8.40am	**Registration**
8.50am	**Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

8.55am **Keynote Presentation**

The consumer revolution

Peter Huber
Chief Executive Officer
Zurich International

- What are the current insurance industry trends and how have they evolved?
- What does that mean for Zurich/insurance companies in general?
- What does the new upcoming regulation mean for Zurich International ME?

9.05am **Panel discussion**

How can wealth management improve the core proposition?

- How is the regulatory framework developing - what are the issues and opportunities?
- How are you changing your business as a result?
- New money comes from where? How can you make the most of this?
- How are business models and platforms evolving?
- How can we all improve outcomes for clients?
- What will be the future development of Islamic Asset and Wealth management? What progress have we made?
- What's the potential for increased wealth in family offices and multi-family offices?
- The UAE is safe, for most has no personal or corporate tax, offers high living standards and has an excellent position geographically. To what extent is it becoming a respected and credible centre for wealth management and attracting HNW and UHNW families?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Sandeep Singh
Senior Director, Regional Head Central Eastern Europe, Middle East and Africa
Franklin Templeton Investments

Mandeep Nalwa
Founder, Chief Executive Officer
Taurus Wealth Advisors

Daffer Luqman
Global Head of Liabilities & Wealth Management, Retail Banking Group
Abu Dhabi Islamic Bank

Deepak Ahuja
Executive Director
NADIA Global

Biswajit Dasgupta
Chief Investment Officer, Head of Global Markets
Emirates Investment Bank

9.55am **Presentation**

Building family legacy through citizenship and residence programmes

Bata Racic
Manager
Henley & Partners

- Why do families relocate?
- What should HNW families consider when carrying out residence and citizenship planning?
- Current developments in residence and citizenship programmes

10.05am **Presentation**

The Islamic legacy planning (r)evolution

Yann Mrazek
Managing Partner
M/HQ

- Generational shifts amongst GCC merchant families : risks & opportunities
- Are the recently introduced domestic legacy tools the solution?

10.15am **Panel discussion**

Family businesses in the GCC – the challenges they face

- What are the challenges that wealthy families have?
- Are increasingly more flexible and sophisticated solutions still needed?
- What are the alternatives they have? Local and foreign?
- How can you bring together the right team to help a wealthy family?
- How are Islamic solutions developing?
- What's happening in the GCC that is interesting?
- What's the difference between the DIFC and Abu Dhabi Global Market?
- What corporate and legacy planning tools are being introduced by other regional financial centres?
- Is this now a robust centre for wealth management, protection and structuring? What else do we need to do?
- Why is now the time that wealth transfer is happening? How can you help your clients transition from one generation to the next?
- Will there be growth in the Universal Life space in the Middle East – like we have seen in Asia?
- What are the next tends for HNW Insurance?

Chair

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Panel members

David Varley
Chief High Net Worth Officer, Sun Life Hong Kong
Sun Life Financial

Muneer Khan
Partner, Financial Regulatory Practice
Simmons & Simmons

David Russell AM QC
Barrister at Law
Outer Temple Chambers

Karim Ghandour
Founder & Chief Executive Officer
LegacyLine Family Office

Yann Mrazek
Managing Partner
M/HQ

Laurence Black
Regional Director, Client Solutions, EMEA
Asiaciti Trust

Vinod Krishnan
Managing Director
Arch Corporation

10.55am **Presentation**

Wealth Protection and Succession Solutions

Laurence Black
Regional Director, Client Solutions, EMEA
Asiaciti Trust

- Family Trusts and Alternative Structures for the MENA Region
- Suitable Jurisdictions - Onshore and Offshore

11.05am **Refreshment & Networking**

11.30am **Presentation**

Digital delivery of wealth management - the era of the platform?

Damian Hitchen
Chief Executive Officer, Middle East & Asia
Swissquote

- Transition of wealth management into the digital era
- Distribution / connectivity is key

11.40am **WealthTalk**

Next Gen Wealth Management

- What makes the next generation of Private Banking clients different?
- Why Private Banks must seamlessly engage and deliver digitally?
- How will the role of Relationship Managers change?

Tariq Bin Hendi
Executive Vice President, Head of Products & Advisory
Emirates NBD

11.50am **Presentation**

Wealth Management 2.0 - a transformative case study

F. Edward Lopez
Chief Revenue Officer
JHC Financial

- Mandating digital as part of your firms DNA
- The digital revolution - its more than just front-office engagement
- Introducing firm-wide digital oversight at your finger-tips - new tools and confidence for the csuite

12.00pm **Presentation**

AI in Digital Wealth Management

Thomas Buemsen
Managing Director, Middle East
Dorsum

- RoboAdvisers won't replace human wealth managers
- Benefits of AI to lead generation and customer management
- Right balance between intelligent automation and human approach

12.10pm **Presentation**

The future of Wealth Management. Developing technology-driven strategies for serving mass affluent and HNW individuals

Jennifer Hansen
Executive Vice President, Head of Global Sales Strategy and Execution
Saxo Markets

- Where are we on the digitisation advancement in terms of technology and acceptance?
- What exactly are we digitising in the broad range of wealth management activities and where do we see the most benefits?
- Digital advisory requires interdisciplinary expertise between financial engineering and financial planning. How confident are we?

12.20pm **Panel discussion**

How do you future proof your business?

- How will firms in wealth management use technology and digital to improve the business?

- What's innovative, interesting or challenging in 2018?
- How do you create an ecosystem that genuinely embraces fintech?
- How do you select vendors today?
- What are the trends in Regtech?
- Making sense of crypto and blockchain - what are the real applications & implications in financial Services?
- Next generation wealth management – what will it look like and what does it mean to you?
- Wealth advisory services – how are they impacted by digital?
- How should bankers embrace digital?
- Millennials create a unique conundrum for big banks - how should you cater to their digital expectations?

Chair

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Panel members

F. Edward Lopez
Chief Revenue Officer
JHC Financial

Anthony Jaganathan
Senior Vice President, Head of Operations & Middle Office, Wealth Management
Emirates NBD

Damian Hitchen
Chief Executive Officer, Middle East & Asia
Swissquote

Sofia Mota
Director and Head of Regulatory and Compliance Services
re/think

George Triplow
Executive Director, MENA Wealth & Asset Management Leader
EY

Thomas Buemsen
Managing Director, Middle East
Dorsum

Jennifer Hansen
Executive Vice President, Head of Global Sales Strategy and Execution
Saxo Markets

13.00pm **Lunch**

13.45pm **Panel discussion**

The Insurance wake-up call – Are we willing and capable of developing better customer outcomes?

- How can we help clients and understand their needs? How does the product offering need to develop?
- What's the opportunity for insurance companies to thrive as wealth management develops?
- Why don't more people buy life insurance and critical illness cover?
- What has to happen for the industry to dramatically increase and move forward?
- The business model for IFAs is obviously changing rapidly. How will we all deal with more

transparency, fee disclosure and the changing economics of how you get paid?
- Who will have what licence?
- What do we need to do to make the market more professional?
- Competency assessment, training and development. Lipstick on a pig or a genuine effort?
- If you can ONLY sell on your platform licenced funds that have been approved by ESCA – what does that mean?
- If products have a different compensation structure – how will you make this transition and who won't survive the pain?
- Will the type of products sold change? With increased focus on protection, critical illness, general insurance and employee benefits?
- You could argue RDR in the UK has been a disaster - few advisers left and the people who need advice don't get it. So why are we doing this?

Chair

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Chief Executive Officer & Founder
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Panel members

Walter Jopp
Chief Executive Officer, Middle East
Zurich International Life

Philip Cernik
Chief Marketing Officer, Middle East & Africa
Friends Provident International

Graham Morrall
Global Sales and Marketing Director
Hansard International

Timothy Searle
Chairman
Globaleye

Philip Story
Head of Distribution, EMEA
Investor's Trust

James Ferguson
Senior Financial Planner
Guardian Wealth Management

14.30pm **Presentation**

A matter of life and death

Philip Cernik
Chief Marketing Officer, Middle East & Africa
Friends Provident International

- Key considerations for expats in the UAE
- Sharia'h law and will planning
- How to die nicely and neatly

14.40pm **Presentation**

India investment opportunity

Aashish Somaiyaa
Chief Executive Officer
Motilal Oswal Asset Management

- Finding long-term value in the Indian Equity market

14.50pm **Panel discussion**

Buy side

- How can you develop your advisory proposition and the quality of the client engagement?
- How are your clients diversifying?
- Are you increasing thinking about model portfolios? Passive vs active? Guaranteed products?
- What products do you feel would be most valuable in this market in 2018?
- Nearly everyone had a good year in 2017 – what are your best and worst predications for 2018?
- How will fees and transparency evolve – and is that good for you?
- What's your view on technology, margin pressure and regulatory reform?
- Multi asset, Income generation and liquid alternatives - Are these still the main themes?
- Distribution and licensing for banks and distributors - what's best?
- Should we differentiate between a professional and a retail investor when it comes to product approvals?
- What's the way forward for how product manufacturers and fund selectors should partner with each other going forward?
- Developing more Shariah-compliant products – what are the challenges and opportunities?

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Chief Executive Officer & Founder
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Panel members

Tariq Bin Hendi
Executive Vice President, Head of Products & Advisory
Emirates NBD

Deepak Mehra
Head of Advisory, Treasury and Asset Management, General Management
Commercial Bank of Dubai

Shiraz Habib
Executive Director, Head of Investment Products & Solutions
First Abu Dhabi Bank

15.30pm **Presentation**

Shocking facts about retirement- a threat or an opportunity?

Szymon Idzikowski
Senior Fund Analyst
Abu Dhabi Commercial Bank

- Trends in a global retirement space
- What can we learn from other markets?

15.40pm **Refreshment & Networking**

16.00pm **Panel discussion**

Sell side

- What products do you have that you feel would be most valuable in this market in 2018?
- Nearly everyone had a good year in 2017 – what are your best and worst predications for 2018?
- How will fees and transparency evolve – and is that good for you?
- What's your view on technology, margin pressure and regulatory reform?
- Multi asset, Income generation and liquid alternatives - Are these still the main themes?
- What's the way forward for how product manufacturers and fund selectors should partner with each other going forward?
- How are you engaging other markets in GCC and even wider – like India and Africa?
- Where is the big opportunity – international private banks, local banks, universal banks, insurance companies / platforms or family offices?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Yunus Selant
Regional Manager Middle East & Africa
Allfunds Bank

Nick Savastano
Head of Offshore Global Life Groups and Middle East Financial Institutions
Invesco

Iheshan Faasee
Client Portfolio Manager
Russell Investments

Dhiraj Rai
Director, Gulf & Eastern Mediterranean
Franklin Templeton Investments

Akhil Chaturvedi
Executive Vice President, Head of Sales and Distribution
Motilal Oswal Asset Management

Faisal Hasan, CFA
Chief Business Development Officer, Head of Investment Research
KAMCO

Scott Littlewood
Fund Manager
Helvetic Investments

17.00pm **Forum End**

Workshops

14.00pm **Workshop**

Delivering wealth management via a digital platform

Damian Hitchen
Chief Executive Officer, Middle East & Asia
Swissquote

Swissquote Bank present their market-leading digital, global-trading and custody platforms for Independent Asset-Managers

14.50pm **Workshop**

A new look at HNW Universal Life - guaranteed returns, and high liquidity

David Varley
Chief High Net Worth Officer, Sun Life Hong Kong
Sun Life Financial

Using HNW Insurance solutions - such as high and low life cover Universal Life, HNW clients can:

- Achieve higher returns, with a guaranteed strong minimum returns, better than a bank account rate
- Secure leveraging and liquidity whenever they need within an insurance policy
- Use insurance solutions for retirement and annuity planning, and effectively avoid probate through proper estate planning