

# 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**

Director of Wealth Management, Bancassurance & Mortgages  
RAKBANK

**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 trends for HNW Insurance?

**Chair**

**Michael Stanhope**  
Chief Executive Officer & Founder  
Hubbis

**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**

### **Michael Stanhope**

Chief Executive Officer & Founder

Hubbis

## **Panel members**

### **F. Edward Lopez**

Chief Revenue Officer

JHC Financial

### **Anthony Jaganathan**

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**

### **Michael Stanhope**

Chief Executive Officer & Founder  
Hubbis

## **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?

#### Chair

**Michael Stanhope**  
Chief Executive Officer & Founder  
Hubbis

#### 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