Taiwan Wealth Management Forum 2018

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.05am	Panel Discussion

How is the wealth management offering in Taiwan developing?

- How are the different business models evolving in the onshore wealth management market?
- Where will the continued growth come from and what are the priorities? How do you scale your business?
- What products and services are offered to wealthy clients and how is this developing?
- How do the different players – wealth management, securities firms, insurance and banks compete or complement each other?
- What changes are we seeing in client expectations and behaviour?
- How is regional wealth management developing in comparison?
- How can we find the right talent? And grow it?
- What are some of the trends we are seeing in Residence and Citizenship-By-Investment Programmes?
- What's the potential for non-banks and other start-ups to eat into existing market share of organisations built on a traditional business model?
- What are the priorities when it comes to digital and technology?
- Have we seen any examples of tangible success in digital wealth management?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

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

Jennifer Lai
Managing Partner, Head of North Asia
Henley & Partners

Richard Straus
Senior Managing Director, Head of Private Banking - Hong Kong
EFG International

Martin Chen
Executive Director
Raffles Family Office

9.50am	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

10.20am Panel Discussion

TECH / DIGITAL = Faster, cheaper and better wealth management?

- What's the potential for non-banks and other start-ups to eat into existing market share of organisations built on a traditional business model?
- What are the priorities when it comes to digital and technology?
- What digital trends are we seeing elsewhere?
- Platforms and processes – whats the role of digital?
- What is the client experience supposed to look like? How is it evolving?
- Have we seen any examples of tangible success in digital wealth management?
- How should banks decide what's working? What KPIs should we use?

Chair

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Founder & Chief Executive Officer
Hubbis

Speaker

Tony Yiu
Sales Director, Greater China Region
ERI

Thomas Tse
Senior Sales, North Asia
WeInvest

William Barkshire
Head of Strategy Greater China
FNZ

11.00am Presentation
Asia Megatrends: opportunities in ASEAN and technology-enabled innovators"

Laura Lui
Partner, Co-Chief Investment Officer
Premia Partners

- With evolving economic and technological development in Asia, is a broad-based China/India strategy still smart enough to capture the growth?
- Prevalent megatrends such as consumer upgrade and digital transformation are happening across the entire Asia region – how to overcome the limitation of GICS classification as we identify the winners?
- As emerging Asian economies such as Thailand and Vietnam are on course for an exponential growth just like what China experienced in the last decade – how to effectively capture such opportunities?

11.10am	Refreshment & Networking

11.35am

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?

12.00pm

Presentation
Digitalization to Gain Competitive Advantage in Wealth Management

Tony Yiu
Sales Director, Greater China Region
ERI

- Client centricity in Digital Wealth Management
- Digitalization Advisory Model
- Digitalization Benefits to Wealth Manager

12.10pm

Presentation
Leading Residence and Citizenship-By-Investment Programmes

Ian Miao
Manager
Henley & Partners

- Overview of Immigration programmes
- European Citizenship-by-Investment in Malta and Cyprus
- EB-5 is not the last solution to the US
- The exclusive residence programmes in Asia

12.40pm

Panel Discussion

Helping wealthy families with their legacy and succession planning

- What are the needs of wealthy Taiwanese Families?
- How are they dealing with legacy and succession planning?
- How do you have a conversation with clients around sensitive family issues?
- New tax developments? • What's the role of insurance in this mix?
- What are the practical considerations for HNW clients in wealth protection and transfer?
- How are these needs developing? And how can you help clients understand these needs?
- What trends are we seeing in Philanthropy?
- How do wealthy clients structure their non-investment assets?
- Do clients really understand the needs they have? • Whats the role today of international financial centres?

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Managing Director, Head of Private Banking, Singapore
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Irene Lee
Business Development Director, Intermediary and Partnership
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1.20pm	Forum Ends