

# Wealth THINK 2016

8.40am Registration

9.00am Welcome Address

James Mirfin  
Managing Director, North Asia  
LSEG

9.05am Panel Discussion

Will Hong Kong continue to be the gateway to China's wealth?

- What's the role that Hong Kong will play in future access to China's wealth?
- How can we make the most of the China opportunity?
- Which business model is most likely to win out in the long run?
- Onshore versus offshoring – where's the biggest potential?
- Which client segments should you focus on to be profitable?
- Should foreign players compete or collaborate with onshore institutions?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Bassam Salem  
Region Head, Asia Pacific  
Citi Private Bank

Neil Harvey  
Chief Executive Officer, Greater China  
Credit Suisse

Michael Blake  
Chief Executive, Asia  
UBP

Eleanor Wan  
Chief Executive Officer  
BEA Union Investment

Jonathan Ha  
Founder and CEO  
Red Pulse

Joseph Tam  
Executive Vice President and Head of Private Banking and Wealth Management  
CMB Wing Lung Bank

9.55am Presentation  
A process to digitalisation

Peter McMillan  
Head of Wealth Management, Asia  
Thomson Reuters

- Connecting ideas to clients
- Enabling relationship managers
- Providing suitable and compliant advice
- Improving the client experience

10.10am

Presentation  
EY's Global Wealth Management Survey 2016

Alexandre Viale  
Senior Manager, Advisory Services  
EY

- EY's wealth management practice surveyed more than 2,000 individual clients and 60 wealth management senior executives globally to demystify client experience and uncover potential revenue opportunities for wealth managers
- There is approximately USD120 trillion of client assets managed by global wealth managers, and 4 out of 10 clients are open to switching wealth managers under the right circumstances
- This represents a USD175 billion to USD200 billion global revenue opportunity for those firms willing to make strategic investments to deliver a superior client experience, while others may find themselves at risk of losing a substantial portion of their current business

10.25am

Refreshment & Networking

10.55am

Panel Discussion

Will private banking in Asia thrive or wither?

- How is the competitive landscape evolving?
- International versus local banks – who is best-placed over the next decade?
- What scale is required to succeed in today's environment?
- Can Hong Kong become a more important global private wealth hub?
- What should the regulators do to facilitate the further development of the industry?
- How should private banks adapt to thrive?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Alvin Ma  
Senior Managing Director, Co-Head of Private Banking  
EFG International

Bobby Bok  
Head of Wealth Management Solutions, North Asia, Financial & Risk  
Thomson Reuters

Thusitha de Silva  
Director  
Cerulli Associates

Timothy Lo  
Managing Director  
CIC

Alan Luk  
Head of Private Banking and Trust Services  
Hang Seng Bank

Ron Lee  
Head of Private Wealth Management, Asia Pacific  
Goldman Sachs

11.45am

Presentation  
Getting onto a bank's funds distribution platform

Stewart Aldcroft

Langley Castle Consulting

- The 4Ps of fund distribution
- Platform approval process
- Why retail distribution in Asia has become more difficult

12.00pm

Presentation  
The changing landscape of overseas real estate: the China factor

Piers Brunner  
Chief Executive Officer, Greater China  
Knight Frank

- Where are Chinese individual investors most active in property markets around the world contributing to price hikes?
- What are the main reasons they buy property overseas? And how does that compare to other foreign investors?
- How about the super-rich? What kind of properties are they interested in?
- What has been the main driver for the outflow of wealth?
- What is the impact of the buying spree by Chinese individuals on market dynamics in markets, including gateways?

12.15pm

Panel Discussion

Asset management - getting access to the China opportunity

- What opportunity does China represent to foreign asset managers?
- What is the most relevant product set to provide diversification and offshore opportunities for Chinese investors looking overseas?
- How is the distribution model likely to change over the next 10 years?
- What are the remaining regulatory hurdles to doing business across borders? How are you addressing them?
- Many asset management companies find it difficult to get long-term partnerships in China that work. How do you tackle this?

- In reality – how will digital effect your business?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Ken Tam  
Managing Director and Head of Asia for RBC Investment Management  
RBC Global Asset Management

Xiao Feng Zhong  
Chief Executive Officer, North Asia  
Amundi Asset Management

Jung Ho Rhee  
President & Chief Executive Officer  
Mirae Asset Global Investments

Stewart Aldcroft  
Senior Advisor, Asian Fund Management Industry Managing Director  
Citi

Eddy Wong  
Head of Funds Business, Hong Kong & China Retail  
J.P. Morgan Trustee

TF Cheng  
Managing Director, Head of Greater China Business  
BNP Paribas

1.05pm

Lunch & Networking

1.55pm

Panel Discussion

The future of retail banking in wealth management

- What's the outlook for retail banks in wealth management in Hong Kong?
- Can Hong Kong banks compete with Chinese players? Do they need to?
- Which client segments will be most lucrative in the next 5 to 10 years?
- How is the product offering and platform likely to evolve?
- How do platforms and client touch-points need to be developed to cater to the retail customers of tomorrow?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Rosita Lee

Head of Investment Products & Advisory Business  
Hang Seng Bank

Janet Chong  
Executive Director, Chief Operating Officer, Consumer Banking Group and Wealth Management  
del-DBS

Robert Rooks  
Partner  
Deloitte

Peter McMillan  
Head of Wealth Management, Asia  
Thomson Reuters

2.45pm

Presentation  
Customer due diligence - identifying source of wealth

Henry Fu  
Director, Governance, Risk and Compliance, North East Asia  
Thomson Reuters

- What is AML and CTF?
- Overview on risk-based approach when doing KYC
- The importance of knowing 'SOW', 'SOI' and 'SOF'

3.00pm

Presentation  
Emergence of Asian multi-family offices: a new option for those looking for service beyond brand

Philippe Legrand  
Chief Executive Officer and Founder  
LCA Solutions

- The changing landscape of Asian wealth management: senior bankers offering their services in a regulated environment but outside the traditional banking platform
- For the sophisticated and entrepreneurial investor that requires more than a standard wealth management offering
- For the senior banker looking to focus on being a lot of things to a limited number of clients
- Why the concept has emerged and how will it evolve in the foreseeable future

3.15pm

Refreshment & Networking

3.45pm

Panel Discussion

Insurance companies – getting their arms around the China opportunity

- How do you play a role as more Chinese wealth moves offshore in search of protection and other wealth solutions?
- What's the right product and proposition?
- How can insurers capture and be successful in the Chinese market?
- Where is the next trend or new innovation in insurance for wealthy Chinese?
- What are the challenges?

- How do insurance companies need to adapt to the digital revolution in China?
- Where will disruption come from?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Alan Armitage  
Chief Executive Officer, Asia and Emerging Markets  
Standard Life

Roger Steel  
President, New Markets and Business Development  
Sun Life Financial

Thomas Young  
Head of High Net Worth Business  
Generali

4.35pm

Panel Discussion

How will Chinese families diversify, protect and grow their wealth?

- What advice do Chinese families need in today's complex world?
- What are the risks for Chinese HNW clients? Such as upcoming estate taxes, inheritance taxes, changes in payment methods, etc
- Onshore versus offshore models – where is the most growth going to come from?
- How can you make the most of the offshoring of Chinese wealth?
- What is the impact of transparency and tax initiatives such as FATCA and CRS on the advice you now need to give Chinese clients?
- How will assets transfer across generations? What can you do to participate in this opportunity?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Howard Bilton  
Chairman  
The Sovereign Group

Nigel Rivers  
Founder and Chief Executive Officer  
Capital Solutions

Steven Sieker  
Partner  
Baker McKenzie

Martin Crawford  
Chief Executive Officer  
Vistra Private Wealth

Kevin Lee

Partner  
Zhong Lun Law Firm

Michael Olesnick  
Partner , Senior Advisor  
KPMG

5.25pm

Forum Ends