Asian Wealth Management Forum 2016

8.40am	Registration
9.00am	Welcome Address Marcel Kreis Chairman Hubbis
9.05am	Panel Discussion What opportunity does Asia represent to you? • What's the real growth in wealth in Asia? • How can you access Asia's ever-growing numbers of HNW and UHNW? • Who, if anybody, has built a profitable and sustainable business in Asia? • What infrastructure and processes do you need to service Asia's wealthy? • How can you make the most of the offshoring of Chinese wealth? • What's the role of Switzerland in Asian wealth management today? • Does the Swiss brand still matter to Asian clients? Should it be redefined? • What does this mean for the continued flow of assets to and from Asia? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker John Williamson Chairman EFG International Lukas Weber Chief Operating Officer, Private Banking Vontobel Asset Management Michael Benz Senior Advisor Synpulse Marcel Kreis Chairman Hubbis Hubbis Sebastian Dovey Ex Managing Partner Scorpio Partnership
9.50am	Presentation What's the outlook for independent wealth in Asia? Anthonia Hui Head of Singapore

AlTi Tiedemann Global

- What does the Asian landscape look like today for independent (external) asset managers and multi-family offices?
- How is it likely to evolve over the next 5 to 10 years?
- What opportunities does this present to you?

10.00am

Panel Discussion

The role for independents in a polarising industry

- Where are independent asset managers and multi-family offices at in terms of awareness, understanding and penetration among Asia's HNW and UHNW population?
- Is there enough momentum for these segments to become more meaningful within the wider industry?
- Is there enough support and the right service from custodians?
- Amid efforts to bring independent players together via associations in Singapore and Hong Kong – what's the appeal (and potential for greater collaboration) with Swiss EAMs and MFOs?
- Will the burden of regulation and greater complexity in managing client assets prove too great for many smaller players?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Alex Borissov
Partner
Finaport

Anthonia Hui
Head of Singapore
AlTi Tiedemann Global

Cliff Go
Chief Executive Officer
Swaen Capital

Ray Soudah
Founder
Millenium Associates

Bruno Patusi
Partner , Wealth & Asset Management Leader
EY

Kripa Sethuraman

10.45am

Presentation
Current trends in residence & citizenship planning for Asian individuals

Jacopo Zamboni
Manager - Key Intermediaries

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

10.55am Refreshment & Networking

11.20am Presentation
Creating robust family offices

Jasmina Zivkovic
Head of Institutional Sales - Europe
Amicorp Group

Kripa Sethuraman

- Common mistakes of family offices
- What are the key building blocks of a family office servicing offering

11.30am Presentation
How corporates can tap Asia's potential

Markus Grossmann
Regional Managing Director
Trident Trust

- Why are European firms looking to Asia?
- How should they set up their businesses in the region?
- Virtual or physical presence
- Comparison Hong Kong / Singapore
- Risks and pitfalls to avoid

11.40am Presentation
HNWI trends in Asia - a Singapore perspective

Chris Burton
Managing Director
Vistra Private Wealth

- Asia Pacific - regional trends
- HNWI drivers in local markets
  - China
  - India
  - Indonesia
  - Thailand
  - Malaysia

11.50am

Presentation
Is Hong Kong still competitive?

Peter Brigham
Director
Rosemont

- The reality of setting up a bank account in Hong Kong
- The Catch 22 of doing business in Hong Kong
- Should you look at Singapore instead?

12.00pm

Presentation
How to prevent Asian business families falling prey to common succession planning problems?

Hans Diederen
Head - Family Office Services
Heritage Asset Management

- The family business as a system
- Why family businesses fail to do succession planning?
- Values, vision and shared purpose
- The importance of both family and business governance
- The benefits of timely preparation
- How to best approach succession planning?

12.10pm

Presentation
Establishing inbound family offices in Singapore

Sunil Iyer
Managing Director, Singapore
IQ-EQ

The presentation will take a look at some common considerations, including:

- Structures used
- Tax & regulation considerations
- Other considerations (eg. immigration)

12.20pm

Panel Discussion

Helping Asian clients address concerns over confidentiality, transparency, security and asset protection

- What's the impact of CRS, AEOI and tax amnesty programmes in countries like Indonesia?
- In the face of changing regulations and the impact on the types of structures that are now relevant, how should you advise Asian clients?
- There is a small – and closing – window of opportunity to get things in place. What do advisers and clients need to know and do?

- How can you protect clients from excessive transparency?
- On-boarding Asian clients – what should you be aware of?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Stephanie Jarrett
Head of the Wealth Management Practice Group,
Baker McKenzie

Andri Manatschal
Partner, International Private Wealth
PwC

Peter Brigham
Director
Rosemont

Chris Burton
Managing Director
Vistra Private Wealth

Markus Grossmann
Regional Managing Director
Trident Trust

1.05pm	Lunch & Networking
1.50pm	Panel Discussion

Where in Asia should your clients invest?

- How should you assess the different markets and asset classes in Asia?
- Are traditional asset classes worth investing in anymore?
- Where in Asia can we still find alpha in such challenging market conditions?
- Private debt and other alternatives – where can you get the best returns?
- India and China – how do we access these markets? Does anywhere else matter?
- Which other markets in Asia offer the most potential at the moment, and why?
- What don't people tell you about the reality – and risks – of investing in Asia?
- What are the key differences in processes, research, time horizon or other factors you must know about to invest in Asia?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Bryan Henning
Wealth Consultant

Alex Buerge
Executive Vice President, Deputy Head of CP Investments
Lombard Odier

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

Alessandro Caironi
Managing Director, Head of UHNWI
Credit Suisse

Andrew Hendry
Managing Director, Asia
Westoun Advisors

2.30pm Presentation
Managing investment risk in Asian equities: challenges and opportunities

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

- The challenge of managing investment risk in Asian equities has increased
- A focus on dynamically managing risk can greatly improve returns
- We illustrate using an example of an Asian equity portfolio

2.50pm Presentation
Removing the funds penetration blockage in Asia

Andrew Hendry
Managing Director, Asia
Westoun Advisors

- The challenge of managing investment risk in Asian equities has increased
- A focus on dynamically managing risk can greatly improve returns
- We illustrate using an example of an Asian equity portfolio

3.05pm Refreshment & Networking

3.35pm Presentation
Investing in Vietnam

Christine Chen
Saigon Securities Asset Management
Clark Advisory

- Where are the biggest opportunities for investors in this frontier market?
- How should they look to get access to Vietnam's growth story?
- What's the potential and market outlook over the next decade?

3.45pm Presentation
China: steady as she goes

Benedict Yap
Vice President, Equities Products Specialist
Fullerton Fund Management

- Understanding the marketplace
- An economy in transition
- Investment themes

3.55pm Presentation
Getting your digital bank ready

Mark Buesser
Chairman
IMTF

- Insights and trends of Swiss & Central European banks' digital journey
- Focusing on achieving client centricity and efficiency
- Low hanging fruits of technology: ICOS/2
- Aligning your strategy to succeed in the digital space

4.05pm Panel Discussion

What are the opportunities as Asian wealth management firms become more digital?

- Everyone in Asia is talking about 'going digital' – but what's really happening?
- Who is winning the digital race?
- How is China leading the way?
- What does the future beckon for fintechs?
- What's the likely influence of robo-advisers in Asia?
- What is the scope for Swiss-based technology vendors to access the Asian wealth management space?
- How should they approach this opportunity?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Francisco Fernandez
Chief Executive Officer
Avaloq

Ralph Mogicato
Entrepreneur, Independent Senior Advisor, Professional Board Member, Angel Investor
Swiss ICT Investor Club

Michael Stemmle
Founder
additiv

Mark Buesser
Chairman
IMTF

4.50pm Presentation

Access to the Singapore market: a regulatory introduction

Rolf Haudenschild
Co-founder
Ingenia Consultants

- The regulatory environment in Singapore
- Licensing for financial advice, discretionary asset management, and banking
- Cross-border access

5.00pm Forum Ends