

Asian Wealth Management Forum 2016

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.10am Panel Discussion

Re-inventing the business of wealth management in Hong Kong

- What's the right value proposition in a more complex and challenging world?
- Which client segments should you focus on to be profitable?
- How can you make the most of the offshoring of Chinese wealth?
- Increasing competency – how do we enhance capability and capacity in Asian wealth management? Is there enough expertise in local banks to build viable propositions?
- What is the impact of transparency and tax initiatives such as FATCA and CRS on the advice you now need to give your clients? And which clients can you now even onboard?
- How can Hong Kong become a more important global wealth management hub? What should the regulators do to facilitate the further development of the industry?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

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

Jan Bellens
Global Banking & Capital Markets Sector Leader
EY

Philippe Legrand
Chief Executive Officer and Founder
LCA Solutions

Antoine Candiotti
Chief Executive, Hong Kong
Indosuez Wealth Management

Lonnie Howell
Chairman
UCAP Asset Management

Albert Chiu
Chief Executive, Asia Pacific Region
EFG International

9.55am Panel Discussion

'Advice' - what does it really mean in Asia?

- The short term investment mind-set in Asia – who is at fault? The bank, the RM, the client, or the regulator?
- Is there any point talking about the concept of offering advice and being needs-based - when we don't do this in reality?
- Will clients ever alter their behaviour if you sell to them in a different way?
- Is the model wrong? How could it be fixed?
- What can be done to engender more trust within the relationship?
- Sales of funds to retail investors and HNW are not very sticky. If there was a genuine outcome-focused and needs-based approach by banks to conversations with their clients, a win-win relationship for all parties would be more likely. How can we make this happen?
- The vast majority of retail / HNW money still sits in cash, with distributors unsuccessful in persuading investors to buy into longer-term investments. How can we change the mind-sets, conversations and sales processes to further accelerate the engagement of suitable investment products?

Chair

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Speaker

Roger Bacon
Asia Pacific Head of CGWM APAC Ultra High Net Worth Business
Citi Private Bank

Anthonia Hui
Head of Singapore
ALTi Tiedemann Global

Gaurav Kumar
Head of Global Key Wealth Accounts - EMEA & Asia
Principal Global Investors

Malik Sarwar
Global Head of Sales Management, Group Wealth Management
HSBC Bank

Arjan de Boer
Managing Director, Head of Private Banking North Asia
ANZ Private Bank

Freeman Tsang
Director of Business Development, Head of China and Hong Kong
Legg Mason Global Asset Management

10.40am

Head - to - Head Q & A

Singapore as a hub for independent wealth in Asia

Anthonia Hui
Head of Singapore
ALTi Tiedemann Global

- Who is AIAM Singapore?
- Value-add to members

- The role of AIAM in the industry and with the regulators

10.50am

Presentation
The future of fiduciary services in private banking

Peter Golovsky
Managing Director, Global Head of Institutional Sales
Amicorp Group

- State of play in the global trust industry
- Factors driving industry change
- Banks at a tipping point - strategic options and choices around delivering fiduciary services
- Opportunities and challenges from global tax transparency, FATCA, CRS

11.00am

Refreshment & Networking

11.30am

Presentation
Wealth management for the digital age customer

Abhra Roy
Senior Product Line Manager and Head, Finacle Wealth Management
Infosys Finacle

- With rapidly changing customer choices and needs and unassailable digitisation, the wealth management industry will need to evolve towards truly customer centric, technology-based and service-driven value propositions
- This presentation looks at wealth management for the digital age customer - what is it, what it is not and how it will require transformations at the fundamental level for organisations to be truly digital?

11.40am

Presentation
Gold - wholesale markets are broken

Seamus Donoghue
Vice President of Business Development
Allocated Bullion Solutions

- Retail markets are electronic while wholesale markets have failed to keep up
- Trading physical vs financial gold
- What drives private banks to choose financial over physical gold
- The opportunity - private banks and gold

11.50am

Presentation
China in transition - headwinds and opportunities

Diamond Lee
Portfolio Manager

Quilter International

- Outlook for the renminbi and the potential impact on the Chinese market and economy
- What to expect next and catalysts that will make us more bearish/bullish
- Potential areas for alpha generation in 2016

12.00pm

Head - to - Head Q & A

Has anything really changed in private banking in Asia?

Marcel Kreis
Chairman
Hubbis

12.10pm

Panel Discussion

The role for independents in a polarising industry

- Where are independent asset managers and multi-family offices at in Asian wealth management?
- Is there enough momentum for these segments to become more meaningful in the wider industry?
- How can we create a clearer and more defined value proposition? For the benefit of clients and all other stakeholders – and to help grow the industry with capable practitioners.
- Will the burden of regulation prove too great for many smaller players?
- Amid efforts to bring independent players together via associations in Singapore and more recently in Hong Kong – how can we attract more private bankers to grow the segment?
- How do business models need to develop from here?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Jessica Cutrera
Founding Partner, Managing Director
EXS Capital

Rohit Bhuta

Eli Bitan
Director
Wingate Asset Management

Eleanor Wan
Chief Executive Officer
BEA Union Investment

Harmen Overdijk
Managing Partner
Caidao Wealth

Riccardo Lehmann
Managing Director
Swiss-Asia Capital

12.50pm

Lunch & Networking

1.35pm

Presentation
Investment products - distribution solutions

Aksel Kitowski
Account Director
Numerix

- Derivatives and structured investment products marketplace – and Numerix
- Integrated risk management for buy-side institutions
- Benefits of straight-through-processing and automation

1.45pm

Panel Discussion

Digital smokescreen

- Everyone is talking about 'going digital' – but are they really doing anything?
- Do most fintechs have any real substance? Who will survive and thrive?
- Will this have any impact on your existing business?
- What's the likely influence of robo-advisers?
- How should established wealth management institutions work with fintechs?
- Are there any consequences of falling behind in the digital race?

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Speaker

Jeroen Buwalda
Partner, APAC Wealth and Asset Management Advisory Lead
EY

Peter McMillan
Head of Wealth Management, Asia
Thomson Reuters

Sameer Chishty
Partner, Head of Global Wealth Management Practice
Bain & Company

2.20pm

Presentation
Residence and citizenship planning for Asian families - an overview

Jennifer Lai
Managing Partner, Head of North Asia
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

2.30pm

Head - to - Head Q & A

How you can make learning and professional development more interesting and effective

Kees Stoute

Regional Private Banking Chief Operating Officer
EFG International

- What is the purpose of Learning & Development (L&D)?
- Is it possible to learn to become a good wealth manager?
- What is effective L&D?
- What are the conditions for L&D to be interesting and effective?
- What are the main L&D challenges in the industry?

2.40pm

Panel Discussion

Insurance: making the most of the China opportunity

- What's the opportunity that China represents to insurance companies?
- 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?
- What role does digital play?
- What are the challenges?

Chair

Michael Stanhope

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Speaker

Roger Steel

President, New Markets and Business Development
Sun Life Financial

David Varley

Head of High Net Worth - Asia
AXA

Eric Lu

Principal, Life Actuarial Practice, China
Deloitte

Richard Collis

Managing Director, Risk Consulting & Software, Asia Pacific
Willis Towers Watson

3.20pm

Refreshment & Networking

3.45pm

Panel Discussion

Product manufacturers and product gatekeepers - do we need to change the rules of the game?

- How can asset management firms make the most of the growth in wealth in Asia? And especially the extent and size of the potential that China represents?
- Markets in 2016 look like being shaky and uncertain at best – what does this mean for your offering for your clients?
- How will the active/passive mix change? And what does this mean for the industry?
- With a seemingly ever-growing number of fund houses vying for market share in Asia – what can these firms do to improve and differentiate their sales force effectiveness and productivity, the client experience, and product development and marketing?
- Is there still room for so many product providers?
- Do fund managers need to change the way they engage, support and communicate with fund gatekeepers?
- Given the various – and often overlapping – distribution channels, what are some of the innovative ways asset management firms can evolve their offering?

Chair

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Speaker

Pius Zraggen
Chief Executive Officer
OLZ & Partners

Norman Chan
Investment Director
NAB Private Wealth Advisory

Wing Chan
Director of Manager Research, Asia
Morningstar

Michael Levin
Head of Asset Management, Asia Pacific
Credit Suisse Asset Management

4.25pm

Panel Discussion

Communication - how can we do it better?

- How can we better understand and respond to the needs of our clients?
- How can we communicate digitally with our clients?
- Why do we feel we must create our own content? Surely there is too much?
- What content works and how is it used?
- What does client education mean today?
- How do we reach the end client? Get new clients?

Chair

Michael Stanhope
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Hubbis

Speaker

Marcel Kreis
Chairman Hubbis
Hubbis

Steffen Schade
Director of Distribution Platforms
AIA

Shanker Iyer

Independent Financial Advisor

Damien Ryan
Senior Advisor
Teneo

5.05pm

Forum Ends