

# Asian Wealth Management Forum 2016

8.40am Registration

9.00am Welcome Address

Marcel Kreis  
Chairman  
Hubbis

9.10am Panel Discussion

The business of wealth management in Singapore - onwards & upwards

- 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 deal with challenges from the onshoring of wealth across South-east Asia?
- 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 Singapore become an ever-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

Bassam Salem  
Region Head, Asia Pacific  
Citi Private Bank

Matthew Dabbs  
Chief Executive Officer  
AAM Advisory

Eng Huat Kong  
Chief Executive Officer, Singapore and South-East Asia  
EFG International

Jason Moo  
Head of Private Wealth Management, South-east Asia and Australia  
Goldman Sachs

Febby Avianto  
Managing Director, Head of Private Banking  
Falcon Private Bank

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

9.50am Presentation

HNW insurance & wealth structuring is changing - here's how you and your HNW clients can benefit

David Varley  
Head of High Net Worth - Asia  
AXA

- One size doesn't fit all in the HNW marketplace
- Find out which HNW products match up with the differing needs of HNW clients
- By meeting your HNW clients' needs, you can secure more HNW clients, more revenue and more referrals

10.00am

Presentation  
In search of yield – exploring the investment opportunity in senior secured loans

Felicity Rivett-Carnac  
Senior Vice President and Portfolio Specialist, Alcentra  
BNY Mellon Investment Management

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BNY Mellon Investment Management

- Global investors continue to actively seek and require yield in a challenging environment for developed fixed income markets, characterised by low interest rates and low inflation rates
- As investors move down the credit spectrum, Senior Secured Loans are an attractive instrument through which to gain exposure to sub-investment grade corporate credit
- This is because of their high levels of security, which promotes low price volatility and high recoveries in the event of default

10.10am

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?

Chair

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Speaker

John Robson

Chief Commercial Officer  
Quantifeed

Gregory King  
Senior Director, Head of Wealth Management Strategy  
FactSet

Mark Wightman  
Asia-Pacific Wealth & Asset Management Consulting Leader  
EY

Ned Phillips  
Founder and Chief Executive Officer  
Bambu

Max Tiong  
Head of Fintech  
DBS Bank

Smita Choudhary  
Executive Director, Head, Digital and Business Transformation  
Bank of Singapore

10.50am Refreshment & Networking

11.20am 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 needs and unassailable digitisation, the wealth management industry needs to evolve towards a truly customer centric, technology-based and service-driven value proposition
- This presentation explores the agents of change and the transformations in the financial services and wealth management spaces for the digital age customer

11.30am Presentation  
What HNWLs want: technology and the client experience

Gregory King  
Senior Director, Head of Wealth Management Strategy  
FactSet

- The relationship between the HNWL/UHNWL individual and the wealth manager is evolving, driven in part by technology
- Change, particularly technological change, has not come easy to the wealth management industry
- Learn from our latest survey of 1,000+ HNWL/UHNWL individuals in Singapore, Switzerland, UK & US regarding the expectations of the client in their relationship with the wealth manager, and how they expect that relationship to evolve over time

11.40am Presentation  
Investment products - distribution solutions

Erdem Ozturk  
Managing Director  
Numerix

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

11.50am

Presentation  
Residence and citizenship planning for Asian families - an overview

Dominic Volek  
Group Head of Private Clients and Member of the Executive Committee  
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

12.00pm

Head - to - Head Q & A

Health insurance as part of financial planning

Derek Goldberg  
Managing Director, Southeast Asia  
Aetna

- Health insurance as a means of managing unexpected expenses in the future
- Health insurance helps members navigate a complex healthcare system
- Case studies

12.10pm

Panel Discussion

Insurance companies: can they make the foray into wealth management count?

- Where are the biggest opportunities for insurance companies within Asian wealth management?
- How should insurance companies look to brand themselves going forward in the wealth management space?
- What is driving the move from protection to retirement solutions, investment products and asset management? Is it sustainable?
- What role does digital play?
- Where do you expect the biggest game-changers to come from?
- What are the challenges?

Chair

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Speaker

Owen Young  
Managing Director, Regional Head, Wealth Management for Africa, Middle East & Europe  
Standard Chartered Bank

Frank Troise  
Managing Director, Head of Digital Distribution (Asia)  
Leonteq

Nicholas Kourteff  
Chief Executive Officer, Singapore  
Transamerica Life (Bermuda)

Toby Simpson  
Sales Director, Singapore  
Friends Provident International

Koh Hoe Shin  
Chief Executive Officer  
Manulife Financial Advisers

12.50pm

Lunch & Networking

1.30pm

Panel Discussion

Dealing with the reality of the regulatory burden - how prepared are you?

- What is the impact of transparency and tax initiatives such as FATCA and CRS on the advice you now need to give your clients?
- What impact do you see the 'Panama Papers' having?
- Which clients can you now even onboard?
- How do you see regulatory developments impacting cross-border activity?
- Will we ever breed a true culture of ethical compliance?
- How will the proposed changes to the AI regime impact you?

Chair

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Founder & Chief Executive Officer  
Hubbis

Speaker

Mark Smallwood  
Managing Director, North Asia Coverage Team Head  
Deutsche Bank Wealth Management

Evrard Bordier  
CEO and Managing Partner  
Bordier & Cie

Adriel Loh  
Managing Director, Global Head of Compliance  
Bank of Singapore

Amar Bisht  
Head of Wealth Strategy and Advisory  
Orbium

Markus Blattmann  
Managing Director, Chief Risk Officer Asia Bank

Julius Baer

Stefan Kuhn  
Head of Compliance, Private Banking, South-east Asia  
Credit Suisse

2.10pm

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

2.20pm

Presentation  
China in transition - headwinds and opportunities

Oliver Lee  
Investment Director, Asia Equity  
Old Mutual Wealth

- 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

2.30pm

Presentation  
Digital wealth: innovation to transformation

Jaideep Billa  
Chief Executive Officer and President, Intellect Wealth Management (iWealth)  
Intellect Design Arena

- Why everyone is talking about digital wealth management
- How companies are leveraging digital wealth
- The adoption path for digital wealth
- How to measure success of digital wealth initiatives

2.40pm

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?

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Speaker

Paul Hodes  
Wealth Management Head Asia & EMEA UK Wealth Management Head  
Citi Private Bank

Paul Gambles  
Director  
MBMG Group

Steve Knabl  
Chief Operating Officer & Managing Partner  
Swiss-Asia Financial Services

Patrick Donaldson  
Head of Wealth Management Solutions, ASEAN  
Thomson Reuters

Gary Harvey  
Chief Executive Officer  
Nexus

Anurag Mahesh  
Global Head of Key Client Partners  
Deutsche Bank

3.20pm

Refreshment & Networking

3.50pm

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?
- 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?

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Speaker

Rodolphe Larque  
Head of Managed Solutions APAC  
Credit Suisse Wealth Management

Philipp Portmann  
Partner  
Fundinfo

Arthur Wu  
Senior Investment Analyst  
Morningstar

John Cappetta  
Executive Director, Head, Managed Solutions Advisory for Singapore  
Julius Baer

Bruno de Pampelonne  
Chairman  
Tikehau Capital

4.30pm

Panel Discussion

Where are the best investment opportunities for YOUR clients today?

- Public vs Private markets.
- Equities - EM versus developed markets
- Fixed income - Asian credit or G3? USD or local currency?
- Where do commodities fit in? Which ones should we be focusing on?
- Alternatives - where is the biggest opportunity?
- What's the role of real estate in today's markets?
- How can clients really build a high-quality, diversified portfolio?
- What are the biggest risks for the second half 2016?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Alexander Benard  
Chief Operating Officer  
Schulze Global Investments

Veronique Fournier  
Head of Switzerland  
Baring Asset Management

Philip Lung



Managing Director, Division Head. Mellon Capital  
BNY Mellon Investment Management

Kevin Talbot  
CIO Fixed Income Asia  
Aviva Investors

Ranjiv Raman  
Head of Investments & Treasury  
Cazenove Capital

Lim Say Boon  
Managing Director, Chief Investment Officer, Group Wealth Management & Private Bank  
DBS Bank

5.30pm

Forum Ends