Asian Wealth Management Forum 2017

8.40am	Registration
9.00am	Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel Discussion

What does Asia mean to you?

- What key trends are we seeing in wealth management / private banking in Asia?
- Is the opportunity as large as we all think? How do we maximise its potential?
- What's the real story behind the development of wealth management in Asia?
- How can you scale your business in Asia in a sustainable and profitable way?
- How do you access Asia's ever-growing numbers of HNW and UHNW?
- How is the balance between offshore and onshore wealth developing? How are local banks competing in the HNW space?
- How is wealth management developing in the big markets, like India and China?
- Given the wave of consolidation – what is the future for international private banking in Asia?
- Who are the leading players today? Who will be the successful firms of tomorrow?
- How is the independent model developing in Hong Kong, Singapore – and elsewhere? Will it ever gain any real traction?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Urs Brutsch
Managing Partner & Founder
HP Wealth Management

Andrew Hendry
Managing Director, Asia
Westoun Advisors

Geralda Kral-Buckley
Global Head – Private Clients
Amicorp

Thomas Henze
Head of Global Private Wealth
Swiss Life Global Solutions

Mark Glover
Global Head of Financial Planning, Wealth Management
HSBC

Mahesh Bulchandani

Chief Executive Officer, Asia Pacific Operations
FinIQ

Speaker

9.55am Presentation
Finding the right life insurance solutions for HNW customers

Thomas Henze
Head of Global Private Wealth
Swiss Life Global Solutions

- What suits Asian clients?
- How can these be best positioned?

10.10am Presentation
Whose assets are they anyway?

Peter Brigham
Director
Rosemont

- Issues surrounding the legal ownership and title of financial assets

10.25am Presentation
Singapore & Hong Kong as Asian wealth management centres & overview of CRS and AEOI

Irene Lee
Head of Business Development, Singapore
Equiom Group

- Overview – Asia in general
- Singapore and Hong Kong as wealth management centres
- Singapore & Hong Kong companies
- Brief summary on CRS & AEOI
- Other estate planning tools

10.40am Refreshment & Networking

11.10am Presentation
Discover the 3Ps philosophy

Stephan Leterrier
Director, Business Development
Asia Plantation Capital

- Planet
- Population
- Profits

11.25am

Presentation
Driving growth through digital wealth management

Mahesh Bulchandani
Chief Executive Officer, Asia Pacific Operations
FinIQ

- Delivering a client-centric wealth management offerings
- Creating a unified front-to-back office platform

11.40am

WealthTalk

The winners and Losers in Asian Wealth Management. Will it include the Swiss?

- Who wil be the winning institutions in the next five years
- Will the Swiss finally abandon Asia like the foreigners have abandoned Switzerland?
- Is the digital revolution the end of the old offshore model?

Ray Soudah
Founder
Millenium Associates

11.55am

WealthTalk

Financial planning – is it relevant for Asian HNW & UHNW clients?

- Understanding where financial planning advice adds client value and creates revenue opportunities
- Key enablers – experience from different markets

Mark Glover
Global Head of Financial Planning, Wealth Management
HSBC Bank

12.10pm

WealthTalk

Common structuring mistakes made by families in Asia

- Why are mistakes made?
- What are the common structuring mistakes?
- Can structuring mistakes be rectified?

Dharshi Wijetunga
Partner
Anaford Attorneys

12.30pm

Panel Discussion

How can we create the connectivity with Asia to tap this golden opportunity?

- What's the role of Switzerland in Asian wealth management today?
- With whom do you connect – and with whom can you partner – to make the most of this opportunity?
- How do you access and advise wealthy families from Asia?
- The biggest opportunity in our lifetime is the vast amount of wealth being 'offshored' from China – how can you make the most of this?
- In the face of changing regulations and the impact on the types of structures that are now relevant – what's the best advice and which solutions make most sense for Asian

clients?
- On-boarding Asian clients – what are the issues you will face? What should you be aware of?
- How can European-based wealth managers be better prepared, with more relevant offerings, to service Asian clients – either in their home markets, or when Asian clients venture to Europe?
- What are the regulatory and compliance issues you need to understand?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Loic Pitrou
General Manager, Asia Pacific
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Irene Lee
Head of Business Development, Singapore
Equiom Group

Kripa Sethuraman
Head of Family Office
Accuro

Peter Brigham
Director
Rosemont

Dharshi Wijetunga
Partner
Anaford Attorneys at Law

Rashmi Oberoi
Senior Client Partner
Amicorp

Ralph Mogicato
Owner, Independent Senior Advisor
Hixon Consulting

Speaker

13.15pm	Lunch & Networking
14.00pm	Presentation Asia – emerging market?

Ralph Geiger
Director, Fixed Income Specialist
Credit Suisse Asset Management

- Asia has developed into an area of robust fundamentals and continues to deliver steady growth
- Corporate fundamentals and positive credit trend in Asia look attractive compared with European and US counterparts
- The Asian fixed-income asset class is steadily growing, with markets expanding and the

local investor base growing

14.20pm WealthTalk

Implications of the further opening of China A-Shares to the global investment community

- How do China A shares differ from other emerging market equities? How can investors implement an A shares exposure?
- What would a full inclusion of China A shares in mainstream benchmarks mean for policy allocations to emerging markets?
- How can investors prepare for potential full inclusion of A shares?

Marc Haede
Executive Director, Index Client Coverage
MSCI

14.40pm WealthTalk

The Indian opportunity

- Where has India moved from and where is it going?
- What are the key drivers and challenges to the India growth story?
- How to access the Indian opportunity?

Evan Gallagher
CEO & Managing Director
ASK Capital Management

14.55pm WealthTalk

Finding new investment horizons

- How to participate in the 'Belt and Road' theme
- Where are the investment opportunities?
- What should you know about this story?

Johnson Chng
Founding Partner
A.T. Kearney

15.10pm Refreshment & Networking

15.40pm Head - to - Head Q & A

The fund distribution opportunity in Asia

Andrew Hendry
Managing Director, Asia
Westoun Advisors

15.50pm WealthTalk

Volatility as a diversifier in an Asian Portfolio

Rene Muller
Founder and Chief Executive Officer
ecamos Capital

16.05pm Panel Discussion

Are you ready to make the most of the Asian investment story?

- How should you assess the different markets, products and assets in Asia?
- What role should Asia now play in investment portfolios?
- What's the difference between Asia and other emerging markets?
- Should you and your clients be investing more in Asian fixed income and credit? How do you do this?
- How do you access opportunities in local markets – especially India and China?
- Where should we be looking in private debt and other interesting alternative assets?
- Does liquidity matter to Asian clients?
- How do you need to refresh or reinvent your investment platform to make it relevant to Asian clients?
- What do people NOT tell you about investing in Asia? How can you save time and effort by helping clients to avoid making the wrong decisions?
- What's the best advice you can give your clients around investing in Asia? Should they invest more in the region?

Chair

Andrew Hendry
Managing Director, Asia
Westoun Advisors

Panel members

Ralph Geiger
Director, Fixed Income Specialist
Credit Suisse Asset Management

Sameer Dev
Managing Director
ASK Capital Management

Johnson Chng
Founding Partner
Silk Road Finance

Marc Haede
Executive Director, Index Client Coverage
MSCI

Belal Mohammed KHAN
Head of Investment Strategy - CEMEA
HSBC Private Bank

Ville Oehman
Co-founder
Blockchain Technologies

Speaker

17.00pm Presentation
Cryptocurrencies - are my clients invested?

Ville Oehman
Co-Founder
Helvetic Investments

- Cryptocurrencies are up USD150 billion in one year

- Can this asset class still be ignored as part of a balanced portfolio?
- Will the un-banked get banked, or crypto’ed?
- Cryptocurrency regulation is emerging.
- What’s the right timing to get involved?
- Custody, infrastructure and security challenges for asset managers

17.10pm	Forum End