Hubbis Asian Wealth Management Forum 2017

8.40am	Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel discussion

How can we really deliver value to our clients?

- What do clients actually want from their wealth manager today?
- Who is best-placed to deliver on client expectations?
- How do we know what adds value?
- What are the sustainable ways to generate profit?
- Do we need to rethink the business model?
- International versus local players - who's making progress, and who isn't?
- Is the extent of regulatory reform now at a tipping point?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Vincent Chui
Managing Director, Head of Asia Institutional Equity Distribution & Private Wealth Management
Morgan Stanley

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

Anthonia Hui
Chief Executive Officer
AL Wealth Partners

Thomas Young
Head of High Net Worth Business
Generali

Tuck Meng Yee
Partner
JRT Partners

Debby Davidson
Group Business Development Director, Asia
Equiom Group

9.50am Head - to - Head Q & A

Alternative assets in Asia

Karen O'Hanlon
Managing Director
First Names Group

- In 2017 what do you see being the top advantages / opportunities of planning with alternative assets?
- Alternative assets continue to gain importance in Asia, what are the latest trends you have witnessed?
- What are clients' largest fears of structuring alternative assets; how do they overcome this?
- What is one of the industry's biggest misconceptions around alternative assets?
- Can the client still enjoy the use of alternative assets that are placed in a trust?

10.00am Presentation

Singapore and Hong Kong - Asian wealth management centres

Dr Angelo Venardos TEP, IBF Fellow
Managing Director
Equiom Group

- Assessing the merits and pitfalls of different jurisdictions
- How to decide what's best for your clients

10.10am Panel discussion

Industry debate: Boutique Wealth Managers vs Big Private Banks. Who is best?

- Are big private banks the only option given the cost of doing business?
- Or are boutique, focused and independent wealth managers the best option for clients?
- Is more consolidation a good thing?
- Should scale be the priority to succeed?
- What will the landscape look like in 5 years' time?

Chair

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Panel members

Bassam Salem
Chief Executive Officer Asia Pacific
Citi Private Bank

Francois Monnet
Managing Director, Head of Private Banking Greater China
Credit Suisse Private Banking

Antoine Candiotti
Chief Executive - Hong Kong Branch
Indosuez Wealth Management

Jessica Cutrera
Managing Director
The Capital Company

Riccardo Lehmann
Managing Director
Swiss Asia

Rohit Bhuta
Chief Executive Officer
Crossinvest

10.55am Refreshment & Networking

11.25am Presentation

Can Asia overcome the Trump headwind?

Joshua Crabb
Head of Asian Equities, Asian Equities Team
Old Mutual Global Investors

- Nearly two months into 2017, there remain a number of uncertainties for Asian investors, not least US-China relations under a Trump presidency
- Despite this, our feeling is that Asian equities remain cheap relative to history, while corporate earnings are on an improving trend. But with Asian shares still under-owned what will it take to convince investors?
- What's the case for active management of portfolios?
- Why be optimistic for Asian equities?

11.35am Presentation

Digital wealth management: embracing the new normal

John Robson
Chief Commercial Officer
Quantifeed

Where robo-advice is today and where it's going tomorrow:

- How digital platforms are changing the investing experience for advisers and their clients
- Today's investor mind-set: a focus on goals rather than outperformance
- Stronger together: a halt to the man vs. machine debate
- Trending: mass customisation in automated investment portfolios
- AI & data: the future of customer experience

11.45am Presentation

HNWI and UHNWI clients - how a Variable Life Insurance can address their needs

Steve Hickman
Chief Executive Officer, Singapore
Swiss Life

- Diversification/choice in insurance solutions for HNW clients

- VUL value proposition to HNW clients and private banks
- Understanding why some HNW clients have avoided life insurance as a planning solution
- What does VUL bring to the market that currently is not available

11.55am	Head - to - Head Q & A

Overview of private clients' residence and citizenship planning

Jennifer Lai
Managing Partner, Head of North Asia
Henley & Partners

- What are some of the trends in terms of clients in North Asia seeking migration planning?
- How Henley & Partners sees the current changes affecting the residence and citizenship planning of private clients in North Asia
- How Henley & Partners advises private clients when they consider obtaining an alternative residence or citizenship
- How Henley & Partners helps private clients during their residence and citizenship planning

12.05pm	Panel discussion

The internationalisation of Chinese wealth - how can you capitalise on this opportunity?

- How do we help Chinese HNW / UHNW clients diversify, protect and pass on their wealth?
- How can you build up your client book without going to jail?
- How can you participate in the generation wealth transfer opportunity?
- What are the potential structures and solutions that work best today?
- How do you find, access and retain these clients, especially the next generation?
- What's the right advice given regulatory and tax complexities such as CRS?

Chair

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Panel members

Lennard Yong
Regional Chief Executive Officer, Asia
FTLife Insurance

Michael Olesnicky
Partner, Senior Advisor
KPMG

Kevin Lee
Partner
Zhong Lun Law Firm

Nigel Rivers
Founder and Chief Executive Officer
Capital Solutions

William Probert

Senior Consultant
Sovereign Trust

12.50pm Lunch

13.40pm Panel discussion

China: is the golden goose dead? Where next for insurance companies in Hong Kong?

- Is the disruption in business from China a short-term or long-term problem for insurance companies?
- What are priorities for developing your Hong Kong business?
- What's the opportunity that the development of wealth management means for you?
- What's the right product and proposition?
- Can we develop a business proposition as well as tools which are right for the needs and demands of the next generation?

Chair

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Chief Executive Officer & Founder
Hubbis

Panel members

Ben Worthington
Head of Life Business, Hong Kong
Zurich Life Insurance

William Lee
Associate Partner
Synpulse

Donald Soo
Chief Executive Officer
Orb Global Wealth Management

14.20pm Presentation

Shifting the wealth management model to fee-based solutions from transaction-based sales

Anthony J. Harper
Chief Executive Officer and Co-Founder
Managed Accounts Partners Limited

- How will revenues be generated from assets if mutual funds no longer have retrocessions?
- Likely implications of the recent SFC proposals to require intermediary disclosures on independence, and enhanced fee transparency
- How important is customising client portfolios and providing them look-thru transparency in their holdings?
- Where are discretionary portfolio management penetration ratios today and where are they headed?

14.30pm	Presentation

Why risk-focused investing is a better way to build a portfolio

Harold Y. Kim, Ph.D.
Founder and Chief Executive Officer
Neo Risk Investment Advisors

- Blind-spots in giving portfolio advice – why do most advisers only focus on returns?
- You can't control performance, but you can control risk
- How a focus on dynamically managing risk can greatly improve returns

14.45pm	Refreshment & Networking
15.15pm	Panel discussion

How will we change the mind-set of clients - and focus on long-term goals and portfolio construction?

- How can we develop the advisory proposition and make more money out of it?
- Can the regulatory environment be our friend in driving greater transparency?
- What will be the impact of a new regulatory regime that moves us away from commissions and towards fee-based models?
- Will clients emabrce this approach?
- How do we get more of a client's total wealth?
- Investors hold a mutual fund for 4 years on average in the US, but only a few months in Asia. Will this ever change? Does anyone really want it to?
- What's the process to improve performance?
- How do we make portfolio construction core to the offering?
- Are all the easy wins done with - now the leveraged bond game and others have come to an end?

Chair

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Chief Executive Officer & Founder
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Panel members

Adam Cowperthwaite
Head of Equities - Asia Pacific
Citi Private Bank

Angel Wu
Regional Head of Products & Solutions, Asia & Middle East
ABN AMRO Private Banking

Sen Sui
Head of Wealth Management, Asia
Indosuez Wealth Management

Pius Zgraggen
Partner, Chief Executive Officer
OLZ & Partners

Claudius Tsang, CFA
Partner and Co-Head of Private Equity, North Asia
Templeton Asset Management

Leon Mirochnik, CFA
Head of Business Development
Enhanced Investment Products

16.00pm	Panel discussion

How can you deliver investment performance and avoid risk in 2017?

- 2017 is supposed to be an equities year – will it actually happen?
- Will this be another year of turbulent markets? A replay of 2016?
- How will investors generate performance in 2017?
- How do clients think today? And how do you manage their expectations?
- What are the biggest risks for 2017?
- How will geo-political risks impact the landscape?

Chair

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Panel members

Ronald Lee
Managing Director, Head of Private Wealth Management, Asia Pacific
Goldman Sachs

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

John Haynes
Head of Research
Investec Wealth & Investment

Arjan De Boer
Head of Markets and Investment Solutions, Asia
Indosuez Wealth Management

Stephen Kam
Senior Product Specialist, Asian Equities
HSBC Global Asset Management

Adeline Tan
Head of Investment Advisory, Hong Kong
Mercer

17.00pm	Forum End