Full Agenda - Asian Wealth Management Forum 2019

8.55am

Keynote Address

Chair Opening Remarks: Why we are here!

Malik S. Sarwar
CEO
K2 Leaders

9.00am

Panel discussion

Private wealth management - a time of dramatic change

- In comparison to ten years ago; What has changed? What has not changed?
- What's Hong Kong doing to improve the value proposition in wealth management?
- How can you transition clients to the next generation of bankers?
- Are you ready for the intergenerational wealth transfer?
- Is the next generation willing to Bank with daddy's banker?
- Which countries are the focus? Which clients are the focus? What segments are the focus?
- How do clients want to be serviced today?
- How can you get the right people and proposition in front of the right clients?
- Have incentives changed?
- How has the competitive environment changed?
- Is hiring top performers sustainable? What's the focus on training/hiring/grooming young talent?
- Is the relationship manager less important today?
- The sales process, operational alignment and admin alignment

Chair

Malik S. Sarwar
CEO
K2 Leaders

Panel Members

Vincent Magnenat
Chief Executive Officer of Asia Pacific
Lombard Odier

Anna Wong
Professor of Practice in Finance
Hong Kong University

Nick Pollard
Managing Director, Asia Pacific
CFA Institute

Kees Stoute
Chief Executive Officer, North Asia
EFG Bank

Silvio Struebi
Partner
Simon-Kucher & Partners

9.55am **Presentation**

Globalization 4.0 - World is on the move

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

- Global migration trends
- HNWIs Going Global
- Current Development & Overview of Residence and Citizenship Programs

10.05am **Presentation**

Cyprus Revitalized: How to Capitalize on the Island's reform?

Yiannos Trisokkas
Managing Partner
Casamont Cyprus

- Cyprus Investment Program
- Benefits of Cyprus when structuring your wealth
- Cyprus investment opportunities

10.15am **Panel discussion**

Delivering investment products and advice to clients – time to re-think everything?

- Transparency, Margins, Costs and Fees – what's changing?
- How must we tweak the investment models?
- What digital expectations do clients have?
- As transactional revenue reduces how do you compensate?
- What's the future of Discretionary and Advisory Portfolio Management?
- Connecting customer data to market data – what does this mean?
- What's the role of technology and AI?
- Are FinTech's and Tech Giants threatening our business model?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Patrick Donaldson
Head of Market Development, Wealth Management, Asia Pacific & Japan
Refinitiv

Tariq Dennison
Investment Advisor
GFM Asset Management

Aman Dhingra
Managing Director, Head of Advisory - Singapore
UBP

Sebastien Chaker

Executive Director, Head of Sales & Relationship Management, UBS Fondcenter - Asia Pacific
UBS Asset Management

Jean-Louis Nakamura
Chief Investment Officer, Asia Pacific - Chief Executive Officer, Hong Kong
Lombard Odier

Alison Brown
Director & Head of Sales, Wholesale Business, Hong Kong and China
HSBC Global Asset Management

11.00am **Presentation**

Revenues at Risk – Why wealth managers have to rethink their revenue mix

Silvio Struebi
Partner
Simon-Kucher & Partners

- What does the current revenue mix of wealth managers in Asia look like?
- Which revenue streams are highly likely to decline in the near future?
- How can Wealth Managers and Private Banks achieve a shift towards more recurring revenue streams?

11.10am **Refreshment & Networking**

11.35am **Presentation**

Revisiting Family Governance

Marcus Hinkley
Head of Private Client Services - Asia
Hawksford

Will your family destroy your wealth, or will your wealth destroy your family?

Family dynamics should always be considered by Wealth advisers when structuring a wealth succession plan. In this presentation Marcus Hinkley will consider relevant family issues surrounding the succession of wealth, be it family governance, what's in a family constitution, the impact of divorce, second marriages, balancing the expectations of children or the effects on family wealth of living longer.

11.45am **Presentation**

Overview of Private Trust Companies in Hong Kong

Christiaan de Bruyn
Director, Trust Services
Trident Trust

- Why have PTC's become so popular for wealthy families?
- Benefits of having a PTC to manage and preserve family wealth over the long term.
- Importance of proper structuring of the PTC to avoid disaster scenarios. Who should sit on the Board of Directors of the PTC?
- Comparison of regulatory requirements in HK, Singapore, BVI

11.55am **Presentation**

Malta for wealth management: a hub in Europe at 5.6% GDP YoY growth

Federico Vasoli
Director, dMTV Europe, Member of FinanceMalta
FinanceMalta

- What is driving Malta's growth in an otherwise slower continent
- The Asia-Malta combination: taxes and technologies
- Malta's solutions in wealth management

12.05pm **Presentation**

Choosing the right investment product for the current market environment

Agnes Shea
Co-Head Private Banking Sales Asia
Leonteq Securities

- What is popular with investors at the moment?
- How investment products can complement your clients´ portfolios
- Keeping the flexibility

12.15pm **Presentation**

Private Banking: A new point of view

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

- Building a private bank: 3 strategic questions
- Pillars of building a private bank
- The partnership approach

12.30pm **Head - to - Head Q & A**

What are the emerging trends we are seeing in digital wealth management

Damien Piper
Regional Director, Asia
Finantix

- Tell us a little bit about what Finantix does
- What are the emerging trends you see in digital wealth management?
- How have some of the wealth managers applied A.I.?
- What priorities does Finantix have this year?

12.40pm **Presentation**

The HNW Insurance Market has Changed – Here's how you win

David Varley
Chief High Net Worth Officer, Sun Life Hong Kong
Sun Life Financial

- What's happening in the HNW Market?
- How HNW Brokers, Bankers, EAM can adapt to win in the new HNW Insurance Market
- What are the new Products and Trends in HNW Market
- Why should Bankers and Financial Advisers be interested in HNW Insurance

12.50pm **Presentation**

The Human Advantage

David MacDonald
Head of Learning Solutions
Hubbis

- Trust me - I'm not a robot
- Relationships rule OK!
- Why you?

13.00pm **Lunch**

13.50pm **Room A – Workshop**

Managing Risk in Asian Equity Markets

Asian equity market risk is double the level of risk experienced in Asian markets in 2017. How have you positioned your investment portfolio in response?

You should attend this workshop if you want to participate in a practical, hands on discussion about implementing better risk management and diversification to improve investment performance while reducing risk in Asian equity markets.

Harold Kim, CEO of Neo Risk Investment Advisors, will be sharing some of his thoughts on the recent performance of Asian markets and ways active risk management and diversified alpha exposure can improve performance.

- What are your current investment allocations, and what changes have you made since 2017 and during the course of 2018?
- Managing and understanding risk — how do you estimate risk, and how does it impact your investment process?
- How do you think Asian equity markets will perform in 2019?
- How can you use dynamic risk management to improve performance?
- Are there better diversifying alpha allocations available for equity markets?

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

13.50pm **Room B – Workshop**

Leading Residence and Citizenship-By-Investment Programmes

- Overview of Immigration programmes
- European Citizenship-by-Investment in Malta and Cyprus
- EB-5 is not the last solution to the US

- Thailand Elite – The exclusive residence programmes in Asia

Qishi Fu
Senior Manager
Henley & Partners

Jonathan Tang
Director
Henley & Partners

14.30pm **Room A – Workshop**

Enhancing your impact to delight clients!

- Five habits of effective advisers
- Becoming the differentiated adviser
- Become the primary advisor through continuous self-enhancement
- Sales manager as effective leaders and coaches
- How do you engage clients in challenging markets?
- Where is the return now?
- Simple solutions to discuss with clients today.

Malik S. Sarwar
CEO
K2 Leaders

14.30pm **Room B – Workshop**

ESG Investing and Climate risk – Risks, Opportunities and Concerns

- What drives the demand for ESG Integration Investment?
- What can go wrong with ESG Investing and possible solutions?
- Climate risk and valuations: The case of China A-Shares

Entela Benz-Saliasi
Adjunct Associate Professor, Dept. of Finance
HKUST

15.10pm **Refreshment & Networking**

15.30pm **Panel discussion**

Product Gatekeepers – Leaders Conversation

- What are the main investment themes and the products that will be most relevant in 2019?
- How has the Investment environment changed in Asia from 2017 to 2019?
- How will you generate income in 2019? What is your client's expectation on yield today?
- Managing and understanding risk — how do you estimate risk, and how does it impact your investment process?
- How do you think Asian equity market performance will be in 2019?
- What is interesting in the fixed income and credit universe today?
- What's your view on global equity markets?
- Is there an increasing interest in ESG?
- What's the outlook for emerging markets?
- Is the US market over heated? Are we heading to the next financial crisis in 2020?
- Is Asia warming to index and ETF products?
- What's the interest of private clients today in;
  - Alternatives
  - Private equity
  - Hedge funds
  - Infrastructure

- Property

Chair

Malik Sarwar
CEO
K2 Leaders

Panel Members

Thor Monsen
Head of Hedge Funds, APAC
Citi Private Bank

Arjan de Boer
Deputy Chief Executive, Head of Markets, Investments & Structuring, Asia
Indosuez Wealth Management

Angel Wu
Managing Director, Head of Product Management Group
Bank of Singapore

Simon Godfrey
Senior Vice President, Head of Products
EFG Bank

Matthew Chan
Senior Consultant
Mercer

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

16.15pm **Panel discussion**

Product Manufacturers – Leaders Conversation

- How has the recent US government shut down affected the US company's business planning?
- Has Trump really delivered US domestic growth since being in office? Can you recap his major policies & objectives?
- What's the outlook for US Small and Mid-Cap Equities?
- What's the outlook for global equities?
- How will monetary policy effect markets this year?
- Is GOLD an interesting asset class today? What's its role in a client portfolio?
- What's the difference between physical and paper gold?
- How do you generate income today?
- What new money-market funds have we seen in Hong Kong?
- What developments have we seen for ETFs and Passive funds in Asia?
- How do you think Asian equity market performance will be in 2019?
- How are you managing risk in Asian equities to improve investment performance?
- Has property as an asset class will lost its lustre?
- Are diamonds a good or bad investment?
- What are the common fallacies about the value of diamonds?
- Are diamonds classed as a commodity?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Thorsten Becker
Senior Fund Manager
J O Hambro Capital Management

Tobias Bland
Chief Executive Officer
Enhanced Investment Products

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

Sally Ryder
Founder & CEO
Ryder Diamonds

Joshua Rotbart
Managing Partner
J. Rotbart & Co.

Steven Cohen
Chief Investment Officer
CBM Investment Management

17.00pm **Closing remarks**

Chairman's Closing Remarks: key learnings to apply

Malik S. Sarwar
CEO
K2 Leaders

17.10pm **Forum End**

Workshops