# Hubbis Asian Wealth Management Forum 2019

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| 8.30am | Registration |

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

- What's your best and worst possible scenario for this industry in the next three years?
- What’s your USP?
- How can you transition clients to the next generation of bankers?
- Which countries are the focus? Which clients are the focus? What segments are the focus?
- How can you get the right people and proposition in front of the right clients?
- Is the relationship manager less important today?
- How do you find new clients?
- How do clients want to be serviced?
- What digital expectations do clients have?
- What talent do you really need?
- Even though growth is high - do banks rely too much on hiring? Is employing each other’s RMs and ICs becoming much less effective?

Adam Proctor
Managing Director, Head of Singapore, Australia and New Zealand
Citi Private Bank

Michael Blake
CEO Private Banking Asia
UBP

Anurag Mathur
Head of Retail Banking and Wealth Management, Singapore
HSBC Bank

Pierre Masclet
Asia Chief Executive Officer, Singapore Branch Manager
Indosuez Wealth Management

Alvin Lee
Head of Group Wealth Management & Community Financial Services
Maybank

Vincent Chui
Chief Executive, Morgan Stanley Asia International
Morgan Stanley

9.55am

Head - to - Head Q & A

Global Citizens: Trends and Developments in Investment Migration

Nirbhay Handa, IMCM
Director - GSAT
Henley & Partners

- Why is the Investment Migration industry booming?
- Why does Henley & Partners attend the Hubbis events?
- Where do our clients come from?
- Why do wealth management firms work with us?
- How can H&P help your HNWI clients?
- What are the pitfalls that HNWIs should be aware concerning investment migration?

10.05am Presentation

Choosing the right investment product for the current market environment

Chinmay Patil
Executive Director, Investment Solutions
Leonteq Securities

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

10.15am Panel discussion

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

- Transparency, Margins, Costs and Fees – what's changing?
- The revenue squeeze is on. Where does your revenue come from in future?
- What have you got that means you will be here in five years?
- How do you reconcile the suitability of investment products you sell to your clients with profitability?
- What's the future of Discretionary and Advisory Portfolio Management?
- What digital expectations do clients have?
- 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?

Alexandre Bouchardy
Managing Director, Head of Asset Management Singapore and Head of Fixed Income and Equities Asia
Credit Suisse Asset Management

Chee Loong Chong
Wealth Business Leader, Singapore
Mercer

Alexis Calla
Chief Investment Officer
Standard Chartered Private Bank

Tuck Meng Yee
Partner
JRT Partners

John Robson
Chief Commercial Officer
Quantifeed

11.00am Presentation

Emerging Trends in API / Open Banking

Adrian Williamson
Director - Asia
ERI Banking

11.10am Refreshment & Networking

11.35am Panel discussion

Are you ready for the intergenerational wealth transfer?

- In the transparent and complex world we now live in, what value do clients expect from us?
- How is the role of international financial centres changing?
- There is a huge growth in family disputes. What are the opportunities and challenges?
- What's the role of Insurance? How is this opportunity developing? What does the client need?
- How important is 'substance' today - and what is the role of the International Finance Centre?
- How can you step up and prove that you had the right solution for the client?
- Where are we now with CRS and AEOI?
- How can you demonstrate how important the role of a trustee is?
- How can you protect wealth in the transition to the next generation?
- Has Singapore positioned itself in a very smart way?

Richard Nunn
Regional Head, East
Jersey Finance

Sean Coughlan
Managing Director
Trident Trust

Lee Wong
Head of Family Services, Asia
Lombard Odier

Harry Ng
Head of Wealth Planning Strategy & Solutions, Asia ex-Japan
Nomura

Woon Shiu Lee
Managing Director & Regional Head of Wealth Planning Family Office & Insurance Solutions
DBS Private Banking

Cara Williams
Senior Partner, Global Leader for Financial Intermediaries and Family Offices
Mercer

Lim Cho Peng
CEO
IPG Financial Services

12.15pm Presentation

Riding the ESG wave with MSCI

Valentin Laiseca

Head of ASEAN Index Sales
MSCI

- Analysing ESG fund manager scores with Fundmetrics
- Implementing ESG in the investment process
- ESG ideas for structured products

12.25pm Presentation

Cyprus Island of Opportunities

Ioannis Ioannikiou
Legal Advisor
Casamont Cyprus

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

12.55pm Presentation

The World of Physical Gold

Joshua Rotbart
Managing Partner
J. Rotbart & Co.

- Is gold still relevant today? Who is buying gold these days and why?
- Aren't gold ETFs good enough?
- Are cryptocurrencies taking investors' attention as the new gold?
- Do's and Don'ts of buying physical gold

13.05pm Lunch

13.50pm Room A – Workshop

The Human Advantage

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

David MacDonald
Head of Learning Solutions
Hubbis

13.50pm Room B – Workshop

Global Citizens: Trends and Developments in Investment Migration

- Introduction to the Investment Migration Industry
- Citizenship-by-Investment: Travel and Settlement Freedom for HNWIs
- The world's leading Residence-by-Investment Programs

Nirbhay Handa, IMCM
Director - GSAT
Henley & Partners

Rory McDaid
Client Advisor
Henley & Partners

14.30pm Room A – Workshop

Enhancing your impact to delight clients!

- Leverage omnichannel
- Enhance quality of RM/specialist/sales manager
- Educate, educate clients
- Recommend solutions to achieve client goals
- Become Ritz/Disney of banking

Malik S. Sarwar
CEO
K2 Leaders

14.30pm Room B – Workshop

Choosing the right investment products

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

Chinmay Patil
Executive Director, Investment Solutions
Leonteq Securities

15.10pm Refreshment & Networking

15.30pm Panel discussion

Getting Asset allocation right and finding value

- Where should you be allocated today and why? What's cheap and what's expensive?
  - Equity
  - Fixed income
  - Currencies
  - Commodities
- Is excess optimism and overconfidence – driving the markets to impossible levels?
- Are the U.S. markets and economy in trouble?
- Are investors overestimating return and underestimating risk?
- Which sectors can we "reasonably" expect to grow?
- What are the main investment themes and the products that will be most relevant in 2H 2019?
- How has the Investment environment changed in Asia from 2017 to 2019?
- How will you generate income without taking unrealistic risk?
- How do you think Asian equity market performance will be in 2H 2019?
- Is there an increasing interest in ESG?
- What's the interest of private clients today in;
  - Alternatives
  - Private equity
  - Hedge funds
  - Infrastructure
  - Property

Haren Shah
Managing Director, Head of Investments
Taurus Wealth Advisors

Ranjiv Raman
Head of Investments
Schroders Wealth Management

Marc Lansonneur
Managing Director, Head of Managed Solutions and Investment Governance
DBS Private Banking

Gary Dugan
Chief Executive Officer
The Global CIO Office

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| 16.15pm | Panel discussion |

Interesting and relevant Investment Solutions for 2H 2019

- What is Security Token Offering (STO) / Digital Security Offering (DSO)?
- How do investors benefit from investing in digital securities?
- Why are real estate companies are raising money through digital securities offerings?
- 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 cash / money market alternatives exist today?
- Whats' the outlook for China in 2H 2019?
- How do you think Asian equity market performance will be in 2019?
- What new money-market funds have we seen?
- What developments have we seen for ETFs and Passive funds in Asia?
- How are you managing risk in Asian equities to improve investment performance?
- Is a multi-asset strategy still a good bet?
- What are the thematic investment opportunities that resonate with clients today?

Tony Wong
Head of Intermediary Sales
CSOP Asset Management

Joshua Rotbart
Managing Partner
J. Rotbart & Co.

Joanne Siu
ETF Sales Director
Samsung Asset Management

Julian Kwan
Chief Executive Officer
InvestaX

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| 17.00pm | Closing remarks |

Chairman's Closing Remarks: key learnings to apply

Malik S. Sarwar
CEO
K2 Leaders

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| 17.10pm | Forum End |