Asian Wealth Solutions Forum 2017

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel Discussion

As a private bank – can wealth planning be the differentiating factor for your business?

- What are some of changes you see in the industry – and what are the challenges and opportunities they represent for you?
- Will the opportunity pass private banks by?
- What does the word 'advice' mean today – and who is licenced and capable of providing it?
- Are banks providing the services clients want – or just selling them the services they have to sell?
- What's the role and relevance of wealth solutions specialists within banks today?
- RMs don't tend to get paid to give wealth planning advice – so how do you monetise the engagement?
- How have you structured your organisation to meet the needs of family businesses in Asia? What services and products do you need to offer?
- How will technology impact the engagement with clients? How can you embrace technology?
- How do you co-exist with professional services firms when bringing the right solution to your clients?
- Banks are trying to institutionalise their clients – but is it possible to do that in this space?
- Should a bank pay a retainer to an independent provider who is qualified and licensed to have a wealth solutions conversation with the client?
- You need to cross borders to 'win the war' – how can you achieve that?
- Is an in-house one-dimensional solution any good?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

David Koay
Managing Director, Head of Wealth Management, Singapore & Malaysia Markets
BNP Paribas Wealth Management

Lavanya Chari
Managing Director, Head of Global Products and Solutions, Asia Pacific
Deutsche Bank Wealth Management

Simon Lints
Chief Executive Officer - Singapore
Schroders Wealth Management

	Lee Wong Head of Family Services, Asia Lombard Odier
	Arjan De Boer Head of Markets, Investments & Structuring, Asia Indosuez Wealth Management
	Speaker
9.50am	WealthTalk Family Business Transition • Challenges faced by family businesses • Role of governance Lee Wong Head of Family Services, Asia Lombard Odier
10.00am	Presentation Whose assets are they anyway? Peter Brigham Director Rosemont • Issues surrounding the legal ownership and title of financial assets
10.10am	Presentation Catching the Wave - Alternative life insurance solutions for HNW customers Stephen Hickman Chief Executive Officer, Singapore & Southeast Asia Swiss Life Global Solutions Swiss Life Global Solutions
10.20am	WealthTalk The key component of successful wealth transition • The 3 success factors for smooth wealth transition • Common mistakes to help your clients avoid • How do you choose your specialists? Gerard Gardner Global Head Wealth Solutions EFG Wealth Solutions
10.30am	Refreshment & Networking
11.00am	Presentation Trust structures - products or relationships? Aaron Mullins

Managing Director, Asiaciti Trust Singapore
Asiaciti Trust

- Why not all trusts and trustees are the same
- Helping clients understand what they are buying – and why they should be careful and deliberate in their decision making

11.10am WealthTalk

Wealth TALK Alternative solutions for HNW customers

- The attractiveness of Singapore
- Slowdown in Universal Life sales
- The impact of CRS and fiduciary changes
- The rise of variable products
- Future of interest rates

Walter de Oude
Founder Director
Aviva Singlife

11.20am WealthTalk

Using HNW insurance solutions for liquidity planning and guaranteed returns

Using HNW Insurance solutions - such as high and low life cover Universal Life, HNW clients can:

- Achieve higher returns, with a guaranteed strong minimum returns, better than a bank account rate
- Secure leveraging and liquidity whenever they need within an insurance policy
- Use insurance solutions for retirement and annuity planning, and effectively avoid probate through proper estate planning

David Varley
Chief Partnership Officer - Brokerage, International HuBS
Sun Life

11.30am Presentation
Singapore residents and other Asian residents holding UK assets

Helen Woods
Managing Director, Equiom Solutions
Equiom Group

- UK investments and planning during lifetime
- Mitigating exposure to UK taxes
- Estate planning and UK Inheritance Tax

11.40am Presentation
Investor migration and the rise of the global citizen

Scott Moore, IMCM
Managing Director
Henley & Partners

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

11.50am WealthTalk

How to set up a family office / family trust

- Main drivers for setting up a family office or family trust
- Key features of a family office
- Key features of a family investor fund trust
- What about single family offices?

Woon Hum Tan
Partner, Head of Trust, Asset & Wealth Management Practice
Shook Lin & Bok

12.00pm WealthTalk

The different angles of transparency

- International initiatives, families' assets and transparency in communication between family members
- How do all three come together?

Britta Pfister
Managing Director, Head Wealth Planning Asia Pacific
Rothschild Trust

12.10pm Panel Discussion

Clients don't like to pay for advice – but are they are now hitting a 'brick wall'?

- Clients are so busy haggling over pennies – have they have lost track of the big picture?
- How can we change this 'cheap' mind-set in Asia?
- Do clients understand what's critical and what's not?
- CRS – who really understands it? How do clients get the 'right' advice about CRS – and avoid the large amount of mis-information?
- Do clients trust banks enough to give them this opportunity? Who do they trust?
- Is there a conflict of interest still at most private banks that prevents the right level of engagement with clients?
- Do we need a more independent family office-type structure to serve clients better?
- Does a conversation around wealth solutions need to be independent and open architecture?
- Are wealth planners at private banks now frustrated and shackled? Are they just glorified insurance salespeople?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Woon Shiu Lee
Managing Director, Head of Wealth Planning (Trust and Insurance)
Bank of Singapore

Britta Pfister
Managing Director, Head Wealth Planning Asia Pacific
Rothschild Trust

Anthonia Hui
Chief Executive Officer
AL Wealth Partners

Walter de Oude
Founder & Chief Executive Officer
Singapore Life

Shanker Iyer
Founder & Chairman
The Iyer Practice

Gez Owen
Managing Director & General Counsel
Hubbis

Speaker

12.55pm	Lunch & Networking
1.40pm	Panel Discussion

What do RMs need to do to improve in the conversation around wealth solutions?

- Most RMs have a poor understanding of the reality of their clients' situations – how can they improve?
- How can RMs have a proactive, sensible and sensitive conversation around wealth solutions with clients?
- How do we broaden the conversation past just insurance?
- To move from simple to more complex – how can RMs bring specialists and thought-leadership to clients? And customise a solution?
- What's the incentive for an RM to engage with wealth solutions – internally or externally?
- Do RMs need to understand tax and governance issues? Where do these pieces fit into the puzzle?
- Should RMs discover and understand the legal structure of solutions to help evaluate risks and suitability for the client?

Chair

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Panel members

Gerard Gardner
Global Head Wealth Solutions
EFG Wealth Solutions

Mark Smallwood
Managing Director
Confidentem Private Office

Ian Black
Head of Financial Planning and Wealth Solutions
AAM Advisory

Gary Tiernan
Head of Investments
Crossinvest

Richard Sayers
Managing Director, Singapore
Equiom Group

Jonathan Cheong
Head of Default Risk Management and Solutions
Ingenia Consultants

Speaker

2.25pm WealthTalk

The case for independent wealth planning

- The state of play in the wealth planning industry
- What the client needs
- How to deliver it

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

2.35pm WealthTalk

Preparing your clients for divorce

- The latest trends in international divorce
- Trust and pre-nuptial agreement issues

Marcus Dearle
Partner, Head of Family Asset Protection - Private Client
Berwin Leighton Paisner

2.45pm WealthTalk

Why funds are preferred over trusts for nextgen wealth transfer

- Fund structures are increasingly replacing trust structures for next-generation wealth transfer
- This is due to benefits of double taxation avoidance treaty (DTAT) benefits, ring-fencing of liabilities, segregation of assets, avoiding cross-pledge, ease of operations, etc

Sanjay Guglani
Chief Investment Officer
Silverdale Funds

2.55pm Refreshment & Networking

3.20pm Panel Discussion

Family businesses in Asia – how can YOU help them?

- How do you talk to families about succession and business issues?
- What do UHNW families in Asia need – and how is this changing?
- What shared values should drive family behaviour?
- What's your role in all of this? How can you help set the family agenda – and keep the

family together?
- How do you deal with the next generation?
- How should you advise families where the second-generation siblings have different personalities and strengths?
- How do you manage outcomes, process and fees?
- What governance structure can you put in place to minimise tensions and enhance longevity of the structure?
- How do you avoid working with the 'wrong' client? What do you do if it's not a win-win?
- What's the role of the family office?
- How do you deal with "love" and "fear" within families?

Chair

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Panel members

Kevin Lee
Partner
Zhong Lun Law Firm

Patricia Woo
Partner
Squire Patten Boggs

Nigel Rivers
Founder and Chief Executive Officer
Capital Solutions

Steven Seow
Head of Wealth Management, Asia
Mercer

Speaker

5.15pm Forum Ends