China Wealth Management Forum 2019

8.40am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

Wealth management in China – grasping the opportunity

- Who are the players? What's their USP?
- Where are the biggest opportunities and challenges for the private wealth management industry in China?
- Offshore / onshore. Where is the long-term opportunity?
- What progress is needed to boost the onshore investment proposition?
- Delivering investment products and advice to clients – How can you differentiate yourself?
- What digital expectations do clients have?
- What are the key digital trends and how are they changing the business?
- Are retail investors in China who access funds via digital platforms beginning to diversify away from money-market funds? Will this create opportunities for ETFs and active funds?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Jonathan Ha
Founder and CEO
Red Pulse

Kimmis Pun
Managing Director, Head of Private Banking, Singapore
VP Bank

Leo Shen
China Wealth Leader
Mercer

Ray Tam
Managing Partner & Co-Founder
Raffles Family Office

9.50am Presentation
The digital watch or the hand-made Swiss?

Kimmis Pun
Managing Director, Head of Private Banking, Singapore

VP Bank

- How is private banking developing?
- How do you add value and differentiate yourself?
- What are the different business models you can consider?

10.05am	Presentation Smarter Humans. Smarter Machines

Patrick Donaldson
Head of Customer Strategy, APAC
LSEG

- The devil is in the data: data quality is the biggest barrier to the adoption and deployment of machine learning.
- AI will be the single greatest enabler of competitive advantage in the financial services sector.
- There is disparity in how technologies are being adopted and used around the world. Financial institutions in the United States and Canada are the front-runners; Asian institutions are more advanced than Europe in some areas, while Europe leads Asia in others.

10.20am Presentation
The continuing development of Family Offices in China

Leo Shen
China Wealth Leader
Mercer

- Key developments
- Mercer's insights
- Case studies

10.40am Head - to - Head Q & A

GOLD – shining brighter every day

Christophe Numa
Managing Director
Bunker Group Gold & Silver

- Why is this a good opportunity today?
- What are the key reasons why you should invest in precious metals?
- Where should you keep your Gold?

10.50am Head - to - Head Q & A

Understanding Blockchain & Cryptocurrency

Alexandre Kech
Director, Blockchain and Digital Asset

Citi

- What is the Blockchain? How will it affect this industry?
- What is cryptocurrency and is there an investment trend?
- How do we safeguard digital assets like the security we get with traditional investment in shares and bonds?

11.00am Refreshment & Networking

11.30am Presentation
International Finance Centres: past, present and future

An Kelles
Director GCC
Jersey Finance

- How IFCs have evolved and what the future now holds
- Beneficial ownership: what just happened?
- White Paper: The Evolution of family offices in Asia - Views from Asia's Wealth Management Community

11.45am Panel Discussion

Trends in Wealth Structuring and Legacy Planning in China

- Curating the right solution for clients – what's thrown in the mix today?
- What are the most common concerns of HNW & UHNW clients?
- What specific trends are we seeing from Chinese clients?
- How is the importance of International Financial Centre's changing?
- Are clients 'stress testing' existing trust structures with a particular focus on protecting against external risk: political instability, divorce, bankruptcy etc?
- What is the key driver today for structures?
- Are clients seeking to make their structures simpler or more complex? Why?
- How well prepared are Chinese clients for wealth transition? Is time of the essence?
- In which jurisdictions do Asia's wealthy prefer to house their structures? Why?
- Why is Asia witnessing a proliferation of single-family offices (SFOs) and multi-family offices (MFOs)?
- What's the role of Immigration and Residency Planning?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Ivan Pelle
Founder & CEO
RGN

Alice Quek
Head of Private Client Services, Asia
Hawksford

An Kelles

Director GCC
Jersey Finance

Cong Zhang
Partner
EY

Ceri Pratley
Residency and Citizenship Consultant
The Sovereign Group

Elvis Liu Cheng
Client Advisor
Henley & Partners

Ying Song
Founder, Chairman and CEO
Youmywealth

12.30pm

Presentation
Popular Residence and Citizenship Programs for HNWI

Serena Wang
Senior Manager
Henley & Partners

- About Henley & Partners
- Alternative options for the HNWIs
- Popular Residence and Citizenship Programs for HNWI

12.50pm

Presentation
Revisiting Family Governance

Alice Quek
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 Alice Quek 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.

1.00pm

Presentation
Food for thought: CRS / AEOI – Practical experiences

Ivan Pelle
Founder & CEO
RGN

- CRS Common Reporting Standard – Developments - Participating vs Permanent Non-Reciprocal Jurisdiction

- AEOI Automatic Exchange of Information - Transparency & Tax Planning – Territorial vs WWI taxation
- AEOI and CRS practical experiences

1.10pm	Lunch & Networking
2.00pm	Forum Ends