Digital Wealth - Asia 2016

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.10am	Presentation Digital enablement - redefining the client experience Mark Nelligan Chief Executive Officer Pershing Singapore, a BNY Mellon company • Mark will share insights on how digital enablement is reshaping the adviser and client experience, and deepening engagement
9.20am	Panel Discussion Technology - its role in the future of wealth management • What should CEOs be thinking about today? • What is your digital strategy? • How will you change the client experience? • Does anyone have a clear and differentiated digital strategy? • How can we ‘walk the talk’? • What’s the real priority when investing in technology? • How do we measure the success of our digital wealth initiatives? Chair Michael Stanhope Founder & Chief Executive Officer Hubbis Speaker Stefan Arn Chief Information Officer, UBS Wealth Management and UBS Switzerland & Group IT Head for Strategic Regulatory Initiatives UBS Global Wealth Management Sandipan Ray Managing Director, Chief Technology Officer DeAWM Deutsche Bank Wealth Management Luke Janssen Founder and Executive Chairman Tigerspike Nagaraj Prasadh

Director & Country Head
Intellect Design Arena

Sanjoy Sen
Managing Director, Retail Banking, Asia Pacific
ANZ

Eddy Tai
Global Head of Operations and Technology
Bank of Singapore

10.05am Presentation
The core building blocks of the wealth management model of the future

Alessandro Tortelli
Engagement Lead
Appway

- A strategy executive of a global bank said in a recent study: “Relationship managers fear digital. We must educate, educate, educate, and show them the benefits.”
- We will show you how Digital Banking empowers advisors and customers to collaborate remotely, in-person, or in a digital-physical moment, facilitating advisory across all touchpoints for intuitive full-, self-, or joint servicing.

10.15am Presentation
EY’s Global Wealth Management Survey 2016

Jeroen Buwalda
Partner, APAC Wealth and Asset Management Advisory Lead
EY

- EY’s wealth management practice surveyed more than 2,000 individual clients and 60 wealth management senior executives globally to demystify client experience and uncover potential revenue opportunities for wealth managers
- There is approximately USD120 trillion of client assets managed by global wealth managers, and 4 out of 10 clients are open to switching wealth managers under the right circumstances
- This represents a USD175 billion to USD200 billion global revenue opportunity for those firms willing to make strategic investments to deliver a superior client experience, while others may find themselves at risk of losing a substantial portion of their current business

10.25am Refreshment & Networking

10.55am Panel Discussion

Change management or change the management?

- Do we have the right mind-set to foster and drive change?
- Who’s got it right so far? And who hasn’t?
- What do you need to do to motivate and infect large numbers of people in your organisation with the digital ‘bug’?
- How do we go from planning to innovation to transformation?
- Do it yourself, or get help from outside?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Pranav Seth
Head, Digital & Innovation
FRANK by OCBC

Evy Theunis
Managing Director - Regional Head Customer Segment and Customer Science
DBS Bank

Valerie Bruce
E-Business Specialist
Quilter International

Urs Lichtenberger
Managing Director - Head Client & Front Office Platform,
Credit Suisse Wealth Management

Dirk P Sibiet
Country Technology Officer, Singapore & UAE ABN
ABN AMRO Bank

11.40am

Presentation
One year into the digital private banking journey at Credit Suisse

Urs Lichtenberger
Managing Director - Head Client & Front Office Platform,
Credit Suisse Wealth Management

- What new functionalities and benefits have been rolled out to clients since the launch of our award-winning digital private banking platform one year ago?
- What is the latest on user experience?
- How are clients using the Credit Suisse Digital Private Banking platform, and how has this changed the way we interacted with them?
- What's next for the platform?

11.55am

Presentation
What IF an Uber Wealth was born?

Jaideep Billa
Chief Executive Officer and President, Intellect Wealth Management (iWealth)
Intellect Design Arena

- The promise of digital in context of wealth management
- Digital wealth – elements for innovation and transformation
- From wealth management to returns management
- From relationship management to assisted advisory
- The ultimate digital took-kit

12.05pm

Presentation
Getting your digital bank ready

Mark Buesser
Chairman
IMTF

- Insights and trends of Swiss & Central European banks' digital journey
- Focusing on achieving client centricity and efficiency
- Low hanging fruits of technology: ICOS/2
- Aligning your strategy to succeed in the digital space

12.15pm

Panel Discussion

Fintech: fantasy or reality?

- Everyone who writes a line of code calls themselves a 'fintech'. What's the real definition of a 'fintech'?
- Will fintechs rule the world, or implode?
- Is there any genuine disruption? And are there any new fintechs now, or just bad copies?
- Collaborate or die. But who do you partner with?
- Human advisory versus robos. How can they co-exist?
- How can it be used in the bank today?

Chair

Peter McMillan
Head of Wealth Management, Asia
Thomson Reuters

Speaker

Ned Phillips
Founder and Chief Executive Officer
Bambu

Mark Wightman
Asia-Pacific Wealth & Asset Management Consulting Leader
EY

Mark Nelligan
Chief Executive Officer
Pershing Singapore, a BNY Mellon company

Ng Lee
Vice President And Chief Operating Officer
MetLife

Frank Henze
Independent Consultant in , Asia Pacific

1.00pm

Lunch & Networking

1.50pm

Panel Discussion

Regulation and compliance - what can technology really do to help?

- What are the regulatory and compliance challenges you face today?
- What can technology do to help?
- Is more coordinated risk management and compliance a priority?
- How can we design and define a flexible approach?
- How do we prepare for the regulatory challenges of tomorrow?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Mark Buesser
Chairman
IMTF

Gary Mellody
Partner, Financial Services, Advisory-Risk
EY

Julia Walker
Head of Market Development, Risk, Asia
Thomson Reuters

Joyce Tan
Managing Partner
Joyce A. Tan & Partners

2.30pm

Head - to - Head Q & A

Empowering relationship managers, compliance and management: the key to success in the digital age

Alessandro Tortelli
Engagement Lead
Appway

- In the digital age, how can wealth managers and financial services providers adopt flexible, customer-centric business models which serve clients via multiple intuitive interaction modes – digitally, physically, or a combination of the two?
- How can technology be harnessed to simultaneously automate work, cater to client needs and wants, and allow employees to effortlessly collaborate with one another, while ensuring compliance to current and future regulations?
- In this interview, Appway shares insights, visions and latest experiences for this digital journey

2.45pm

Presentation
Anatomy of a HACK

Jason Hoang
Managing Director, Asia
IRESS

- Cyber attacks are getting greater organisational attention
- Cyber traffic Vs cyber crime
- Top cyber security and crisis management learnings
- Real life case study that was so devastating that the company could no longer operate

3.00pm

Presentation
The evolving PFM & robo-advisory landscape in Asia

Bhaskar Prabhakara
Founder & Chief Executive Officer
WeInvest

- PFM & robo-advisory fintech landscape in the US and evolution
- Asian fintech landscape in the wealth space
- Early reaction from banks and other institutions
- Implications and potential models for the existing wealth industry

3.10pm

Refreshment & Networking

3.40pm

Panel Discussion

What will you be in the future: a platform? A product manufacturer? Or a distributor?

- Can we be all-things-to-all-people?
- What is 'blockchain'? Will it have any impact on banking?
- What does this mean for private banks, retail banks and asset management companies?
- How will this either improve revenues or cut costs?
- Will tech giants rule banking?
- What does the bank ecosystem look like in the future? How open and connected do you become?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Frank Troise
Managing Director, Head of Digital Distribution (Asia)
Leonteq

Adrian Gostick
Managing Director
BondIT

Andrew Koh
Deputy Chief Manager, Risk Management Department, Singapore Branch
China Construction Bank

4.10pm

Panel Discussion

Innovation - enhancing the client experience with an eye on the wealth transition across generations

- How do you need to change the client experience?
- What are the needs of our customers?
- How are client expectations changing the dynamics of their relationships with their wealth managers?
- What are the emerging technologies that will shape our world?
- What's the impact of Artificial Intelligence in the future?
- Millennials create a unique conundrum for big banks - how should they position themselves for the biggest wealth transfer in history?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Ketan Samani
Managing Director, Chief Digital Officer, Asis Pacific
UBS Global Wealth Management

Neal Cross
Managing Director and Chief Innovation Officer
DBS Bank

Andy Feitknecht
Vice President, Professional Services Assentis Technologies
Assentis

Charles Wong
Chief Executive Officer and Founder
Société Privée de Gestion de Patrimoine

Steve Monaghan
Regional Director - Head of Edge (Group Innovation)
AIA

4.55pm Forum Ends