

Full Agenda - Digital Wealth Asia Forum 2018

8.35am **Registration**

8.55am **Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

9.00am **Head - to - Head Q & A**

Stepping out of the box

Bassam Salem
CEO & Founder
Obuhi

- Solving client pain points through digital innovation
- Fixed costs vs variable costs: Rents and Salaries
- Digital Channels of distribution
- Data Analytics and monetization

9.20am **Panel discussion**

What's next for 'digital' in wealth?

- Have we seen any examples of tangible success in digital wealth management?
- How should banks decide what's working? What KPIs should we use?
- Do we focus on the technology without consideration of whether anyone wants to use it?
- Digital tools provided to RMs for advisory – what has been the Banks' experience on the adoption and value add, and any challenges faced?
- How can we improve the culture of innovation and change within Wealth Managers?
- What's the impact of artificial intelligence (AI) and big data analytics?
- How does it save money or drive revenue?
- Build it yourself or PLUG & PLAY?
- Platforms and processes – what's the role of digital?
- Is China where we see the real innovation and opportunities?

[Michael Stanhope](#)
Chief Executive Officer & Founder
Hubbis

Panel Members

Terence Tam
Executive Director, Head of Wealth Management Technology, Asia ex-Japan, Global Information Technology Division
Nomura

Werner Schlossmacher
Managing Director, Platform Solutions Group, APAC Solutions, Markets, Asia Pacific
Credit Suisse

Alan Luk

Head of Private Banking & Trust Services
Hang Seng Private Banking

Jonathan Ha
Chief Executive Officer
Red Pulse

Bénédicte Nolens
Head of Regulatory Affairs for Asia and Europe & CCO for Asia
Circle

10.10am

Presentation

BlockChain, Predictive Analytics, Robo - Evolving and applying within wealth management

Harle Mossman
Managing Director - North Asia
FNZ

- How these technologies are practically being utilised (or intending to be utilised) within the wealth management sector
- How these technologies are evolving from their 1.0 versions
- What impact these technologies will actually have on our existing operating models

10.30am

Presentation

Account Aggregation is a winner takes all game

Tanmai Sharma
Chief Executive Officer
Canopy

- Customer has very set digital habits
- These habits can be exploited to create stickiness and influence buying behaviour
- Data shows that Banks doing aggregation for the customer have an 'unfair' edge

10.40am

Panel discussion

Virtual Banks in Hong Kong; Lots of hype – will it live up to the expectation?

- What is the client experience that clients are looking for?
- Are traditional wealth managers struggling to keep up with client expectations?
- Can new banks be successful? Are they really any different? What is actually digital?
- How will this evolve in Hong Kong?
- Do people see a positive commercial effect? Will anyone make money and how?
- Are payments a problem?
- Is the cost of delivering financial advice and services reduced?
- How will clients transact, monitor portfolios, absorb investment ideas?
- Is there any role for RMs?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel Members

Michael Benz
Senior Advisor/Digital Banking
Synpulse

Gary Ng
Partner, Risk Assurance
PwC

Silvio Struebi
Partner
Simon-Kucher & Partners

Ricardo Wenzel
Director Advisory, Wealth & Asset Management
KPMG

Jacob Wai
Chief Risk Officer
MoneySQ

11.10am Refreshment & Networking

11.35am Presentation

The Digitalization of Client On boarding: improve Customer Experience & Operational Efficiencies while reducing overall Compliance cost

Andreas Wenger
General Manager, Asia Pacific
IMTF

- Self-Service or RM-supported Onboarding
- Main Compliance & KYC Challenges
- RegTech platform: ICOS/2

11.45am Presentation

The Four Waves of Agile

John Okoro
Head of Agile Practice
Orbium

In this session Orbium will present the four waves of Agile from single Agile / Scrum teams, to Agile Scaling, Business Agility and Digital Innovation. Understanding these “waves” is very key to banks charting their course and getting the most out of their Agile / Digital transformations.

11.55am Presentation

Bringing Wealth Management Client Communications into the 21st Century

Shane Meredith
Regional Sales Director - Wealth & Advisory
SS&C Technologies

- Analog Wealth Management in a Digital Asia
- How to Communicate with today's Asian Based Clients

- Welcome to Digital Asia

12.05pm

Presentation

Crypto Currency and Digital Asset Custody

Seamus Donoghue

Vice President of Business Development

Metaco

- The custody landscape
- Key issues for banks and financial institutions
- Balance of security and availability
- What is SILO

12.15pm

Panel discussion

Demystifying all the hype

- Making sense of blockchain - what are the real applications & implications in financial services?
- What's happening in AI – and what's its application in wealth management?
- FinTech – What's working or not working?
- How are FinTech companies partnering with larger more established institutions?
- What makes these partnerships work - what both sides are looking to achieve?
- What has emerged from any of the Incubators, Labs and other initiatives?
- There has been lots of talk – but what's next?
- What's really under the lid? Is there any genuine innovation?

Chair

[Michael Stanhope](#)

Chief Executive Officer & Founder

Hubbis

Panel Members

Christophe Lee

Founding Partner

JP Asia Partners

Frank Henze

Practice Lead - Financial Services IT

Trimantium GrowthOps

Mark Wightman

Partner, Wealth & Asset Management Advisory

EY

Seamus Donoghue

Vice President of Business Development

Metaco

Jamie Spence

Founder & Managing Director

Asian Link

13.10pm

Lunch

13.50pm

Presentation

How can you win the digital race? – Monetise effectively

Silvio Struebi

Partner

Simon-Kucher & Partners

- FinTech disruptors have leapfrogged the digitalisation race, are banks missing out on the race? (Agility vs. organisational complexity: how FinTechs are monetising things differently than banks)
- What can banks do to effectively position themselves in the digital world? (Competitive advantages, innovate solutions, enhance current product landscape, build a sustainable revenue model)
- How should banks monetise and determine the right price tag for new online services? (Design product around customer's willingness-to-pay, exploit customer data, open banking, monetising APIs)

14.20pm

Panel discussion

Women in FinTech - Development and Disruption. Fintech shaping the future.

- What's the role of women in FinTech in Hong Kong and how is that evolving?
- What can we do to attract more Women in FinTech?
- What's the development of FinTech and RegTech in Hong Kong?
- Where is the discussion today around Crypto? Still interesting and viable?
- What's the role of Digital in insurance and how is that developing?
- What's the usage of alternative data and how it can lead to enhanced profit margins?
- How is digital transformation happening in most firms and how can this capture new revenue pools?

Chair

Kimberley Cole

FinTech Adviser

Panel Members

Bénédicte Nolens

Head of Regulatory Affairs for Asia and Europe & CCO for Asia Circle

Vippy Wong

Partner

Quinlan & Associates

Michelle Chan

Head of Business Development

FWD

Avril Parkin

Committee Co-Chair for Big Data

Fintech Association of Hong Kong

15.10pm

Refreshment & Networking

15.30pm

Panel discussion

DIGITAL = Faster, cheaper and better wealth management

- How will new platforms impact the wealth management space?
- Is Robo still a term that's mis-used and misunderstood?
- Is it possible to integrate Robo offerings into existing wealth platforms?
- What does the platform of tomorrow look like?
- What's the likelihood we can engage clients directly?
- Have consumers, banks and consultants really embraced 'new stuff'?
- How can digital improve investment outcomes for clients?
- How can you improve the middle and back office?
- What should the investment engine behind digitized advice be?
- Can you deliver 'advice' using digital?
- Is digital just about doing this cheaper?

Chair

[Michael Stanhope](#)

Chief Executive Officer & Founder
Hubbis

Panel Members

Mathias Helleu

Executive Chairman
8 Securities

Tanmai Sharma

Chief Executive Officer
Canopy

Clarie Kwa

Director
360F

Tariq Dennison

Investment Advisor
GFM Asset Management

Gabriel Goh

Head of Research and Development, Asia-Pacific
FNZ

Audrey Wong

COO & CFO
Quantifeed

Matthew Chan

Senior Consultant
Mercer

16.30pm

Forum End

Workshops