

Digital Wealth Asia Forum 2018

8.35am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Head - to - Head Q & A

Stepping out of the box

Bassam Salem
Senior Adviser
McKinsey & Company

- 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?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

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

Werner Schlossmacher

Managing Director, (Digital) Platform Management, Asia Pacific
UBS

Alan Luk
CEO & CIO
Winner Zone Asset Management

Jonathan Ha
Founder and CEO
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
CEO and Founder
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

Founder & Chief Executive Officer
Hubbis

Speaker

Michael Benz
Senior Advisor
Synpulse

Gary Ng
Partner, Risk Assurance
PwC

Dr. Silvio Struebi
Partner
Simon-Kucher Global Strategy Consultancy

Ricardo Wenzel
Advisory Director, Wealth and 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, APAC
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 GlobeOp

- 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
Allocated Bullion Solutions

- 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
Founder & Chief Executive Officer
Hubbis

Speaker

Christophe Lee
Founder & CEO
Lotus Asset Management

Frank Henze
Practice Lead - Financial Services IT
Trimantium GrowthOps

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

Seamus Donoghue
Vice President of Business Development
Allocated Bullion Solutions

Jamie Spence
Founder & Managing Director
Asian Link

1.10pm

Lunch & Networking

1.50pm

Presentation
How can you win the digital race? – Monetise effectively

Dr. Silvio Struebi
Partner
Simon-Kucher Global Strategy Consultancy

- 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)

2.20pm

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

Speaker

Vippy Wong
APAC Consulting Lead, Refinitiv Access
Refinitiv, an LSEG Business

Michelle Chan
Head of Business Development
FWD

Avril Rae
Director, Head of Fintech
KPMG

3.10pm

Refreshment & Networking

3.30pm

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
Founder & Chief Executive Officer
Hubbis

Speaker

Mathias Helleu
Executive Chairman
8 Securities

Tanmai Sharma
CEO and Founder
Canopy

Clarie Kwa
Chief Market Officer
360F

Tariq Dennison
Wealth Manager, US-Asia
GFM Asset Management

Gabriel Goh
Global Head of R&D
FNZ

Audrey Wong
COO & CFO
Quantifeed

Matthew Chan
Senior Consultant
Mercer

4.30pm

Forum Ends