Digital Wealth Asia Forum 2019

8.35am Registration

8.55am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am Panel Discussion

The power of digital – A brave new world opening up

- What issues are at the top of the agenda for wealth, asset management firms and private banks?
- How can you justify an expensive front office in the digital age?
- Will the private wealth management industry survive the shift to cheaper custody and the blockchain?
- How is Technology changing the distribution landscape for investment products in China and elsewhere?
- How will the wealth and asset management model need to develop?
- Digital transformation remains high on the agenda for financial institutions – but are we moving quickly enough?
- How should you decide what's working? What KPIs should we use?
- Accelerating change: how can you overcome the barriers to successful transformation?
- What are the regulatory and compliance challenges?
- Do we focus on the technology without consideration of whether anyone wants to use it?
- Many of the services banks provide are now available from tech providers as modular, plug'n'play software-as-a-service. How will this affect the industry?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Damien Mooney
Managing Director, Head of Aladdin Wealth Tech for Asia Pacific within BlackRock Solutions
BlackRock

Francois Monnet
Managing Director, Head of Private Banking North Asia, Chief Executive Hong Kong Branch,
Credit Suisse Wealth Management

Hin Han Shum
Associate
Squire Patton Boggs

Dr. Silvio Struebi
Partner

Simon-Kucher Global Strategy Consultancy

Bassam Salem
Senior Adviser
McKinsey & Company

Audrey Wong
COO & CFO
Quantifeed

9.50am

Presentation
Regionalisation of Wealth Businesses – a Digital & Platform Perspective

Gabriel Goh
Global Head of R&D
FNZ

- One core platform multiple jurisdictions
- Multi-channel, multilingual, multi asset, multi-currency
- Agility is critical – things are moving faster than ever

10.00am

Presentation
Why wealth managers need effective onboarding

Shane Meredith
Asia Director - FinTech & Wealth Advisory
Contemi Solutions

- How onboarding drives clients away
- Onboarding for intergenerational wealth management
- Wealth management for the digital economy
- What your onboarding technology needs to do

10.10am

Presentation
The wealthcare journey

John Robson
Chief Commercial Officer
Quantifeed

To meet customers' growing expectations of wealth management, financial institutions are looking for ways to provide planning and advisory services with greater efficiency, flexibility and scale. With the rise of robo-advisors, micro-investment services and portfolio management tools, wealthtech is a real game-changer. But where does this journey begin, what are some of the common pitfalls along the way, and what are the key benefits?

Join John Robson, Chief Commercial Officer of Quantifeed, as he takes you on a tour of how wealthtech enhances the customer experience, provides efficiencies for advisors, and creates value for your organisation.

10.20am

Panel Discussion

The Pros and Cons of Virtual Banks vs. Traditional Banks

- Has the development of digital banking in Hong Kong been too slow? What evolution will we see in the next few months?
- Can virtual banks be successful? What’s different?
- What’s the business model and strategy?
- Will this lead to more innovation and a better client experience?
- Who is the customer? Will big banks still retain the overall customer relationship?
- Can Virtual banks actually be nimble and more cost effective?
- Are traditional banks in denial?
- Are traditional banks / wealth managers capable of keeping up?
- Is there enough capability and capacity in Hong Kong to execute all this?
- What are the regulatory and compliance challenges?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Manish Prasad
CEO
Ignition Advice

Josh Heiliczer
Partner - Financial Services Risk Management
EY

Ricardo Wenzel
Advisory Director, Wealth and Asset Management
KPMG

Sean Huang
Head of Business Innovation and Growth
Synpulse

Karen Man
Partner
Baker McKenzie

Simon Hawkins
Counsel
Latham & Watkins

Gabriel Goh
Global Head of R&D
FNZ

11.10am	Refreshment & Networking
11.40am	Presentation Combining customer and market data – an experiment

Johanan Thomas
Market Development Performance Director, Wealth
LSEG

- What are the evolving needs of an investor and what do advisors need to do to stay relevant

- What technology and data capabilities are required to empower advisors to better serve their clients
- How will combining customer and market data drive customer centricity and higher productivity for advisors

11.55am Presentation

How to become a truly digital private bank

Michael Zwiefler
Independent
Independent Financial Advisor

- What can private banks learn from native digital firms?
- How to compete as private bank in a digital world?
- What does the DNA of a truly digital private bank look like?

12.10pm Panel Discussion

Who will win the data-driven prize?

- What's the impact of artificial intelligence (AI) and big data analytics?
- There's a lot of data – how can you ask the right questions?
- How can AI and Data save money or drive revenue?
- How can data-driven insights enable fund managers to build better and more suitable products?
- From raw data to insights: how can banks make the leap?
- Financial modelling, portfolio management and asset allocation: What's the role of AI in the future?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Bernard Lee
Founder & CEO
HedgeSPA

Jason Tu
Co-Founder and CEO
MioTech

Vippy Wong
APAC Consulting Lead, Refinitiv Access
LSEG

Johanan Thomas
Market Development Performance Director, Wealth
LSEG

Jay Sala
Partner, Financial Services, Advisory
EY

1.00pm Lunch & Networking

2.00pm	Panel Discussion

How wealth managers are looking at crypto assets and the blockchain?

- What regulatory changes have we seen recently and what opportunities and challenges will this create?
- Blockchain - what are the real applications and implications in financial services?
- Roadblocks/Challenges for greater adoption in the capital markets / wealth management?
- Dive into the Eco-system, what exists, what is being built, what is needed?
- How will it affect the wealth management industry + Investment Opportunities?
- How do we safeguard digital assets like the security we get with traditional investment in shares and bonds?

Chair

Christophe Lee
Founding Partner
JP Asia Partners

Speaker

Alexandre Kech
Director, Blockchain and Digital Asset
Citi

Avril Rae
Head of Fintech, Hong Kong
KPMG

Henri Arslanian
FinTech & Crypto Leader, Asia
PwC

Stephanie Luo
Client Solutions & Partnerships
InvestaX

Lars Rottmann
Director of Business Development
Skyhook Capital

3.00pm	Refreshment & Networking
3.30pm	Forum Ends