

DPM – How to elevate the offering and how do you get it right?

3.00pm

DPM – How to elevate the offering and how do you get it right?

- What are the core reasons that Asia's private clients should embrace the DPM proposition?
- Which markets, for example, Switzerland, have really achieved high levels of DPM penetration, and why and how?
- At what pace is DPM expanding in Asia, and what are the key drivers as well as the core hindrances?
- Can Asia's private clients change their mindsets and relinquish more control of their investments to the professional asset management community?
- Has the pandemic enhanced the logic for DPM and engagement with DPM by Asia's private clients?
- What evidence is there that DPM outperforms and therefore offers private clients the right proposition?
- Who is winning the DPM race - the global private banks, the boutique and regional private banks, or the IAMs/EAMs?
- How do the banks and other wealth firms adjust their management approach and remuneration packages to encourage RMs and advisors to promote more DPM amongst their clients?
- Is it only in the offshore wealth markets that the logic of DPM is winning through, or is DPM beginning to shine in the region's onshore wealth markets?
- Specifically, what are the typical basic terms of a DPM mandate?
- What types of DPM portfolios are on offer?
- What roles do active funds and ETFs play in DPM allocation?
- What are the regulatory issues to consider as the DPM proposition is rolled out more widely?
- What characteristics really count towards differentiation?
- How do the clients engage with the banks and firms handling their DPM mandates?
- How do you hire and retain the right talent to handle the growing volume of DPM mandates?
- What needs to happen during these mandates to ensure that clients stick with the providers?

Jeffrey Wong
COO
Hywin International

Grizelda Lee
Head of Asset Management Asia, Public Markets Solutions
Indosuez Wealth Management

Harmen Overdijk
Chief Investment Officer
Leo Wealth

Jean-Louis Nakamura
Chief Investment Officer, Asia Pacific - Chief Executive Officer, Hong Kong
Lombard Odier

Isaac Poole
Global Chief Investment Officer Portfolio Manager
Oreana Financial Services

4.00pm

Webinar Ends