

EFG Insurance Summit – Hong Kong

8.30am Arrival and refreshments

9.00am Welcome Address

Gerard Gardner
Global Head Wealth Solutions
EFG Wealth Solutions

9.15am Presentation
Capturing missed HNW sales opportunities

David Varley
Chief Partnership Officer - Brokerage, International HuBS
Sun Life

- Exploring the insurance needs and concerns of HNW clients / families
- Using Insurance as a Wealth Planning solution for Estate Planning, Asset Protection and Over-funding
- Capturing Missed HNW Sales Opportunities through a different Universal Life offering & HNW Critical Illness Coverage

9.45am Presentation
Insurance opportunities in North Asia

Jim Kelso
Chief Executive Officer, Asia Pacific
Howden Private

- The insurance business in Asia, particularly North Asia is surging... why?
- The growth and size of the market – including new entrants into the insurance market
- Case studies
- New financing options

10.15am Panel Discussion

How to understand the insurance needs of HNW clients

- What does the opportunity in helping wealthy individuals and families insurance meet their protection needs mean to you?
- How are these needs developing? And how can you help clients understand these needs?
- What are the practical considerations for HNW clients in wealth protection and transfer?
- How can you best engage clients in these discussions?
- Why do clients buy certain products?
- What are the risks and considerations with existing products they buy?
- What questions should you ask to determine the most suitable product for a client?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

David Sussman
Managing Director
EFG Wealth Solutions

Hugh Ellerton
Senior Director
EFG Wealth Solutions

David Varley
Chief High Net Worth Officer
Sun Life Hong Kong

James M. Kelso
Chief Executive Officer - Asia Pacific
IPG

Chris Albrecht
Head of Representative Office, Hong Kong, Global Private Wealth
Swiss Life

Eddie Fung
Chief Alternative Distribution Officer
AXA

Speaker

11.00am

Refreshments

11.10am

Head - to - Head Q & A

Universal Life 101

Jim Kelso
Chief Executive Officer, Asia Pacific
Howden Private

11.20am

Presentation
Re-defining total solutions

Eddie Fung
Chief Alternative Distribution Officer
AXA

- Risk transfer
- Legacy planning
- Insurance needs / solutions
- Company strength matters

11.50am

Presentation
So, there's two goldfish in a tank

Christopher Albrecht
Head of Representative Office, Hong Kong, Global Private Wealth
Swiss Life Global Solutions

- Diversification and evolution of insurance solutions to meet needs of a more educated and sophisticated client demographic
- Impact and implementation of CRS with a view to insurance
- Giving clients what they need, by listening properly to their requirements

12.20pm

Panel Discussion

The internationalisation of Chinese wealth - how to capitalise on this opportunity

- How do we help Chinese HNW / UHNW clients diversify, protect and pass on their wealth?
- What are the needs of these clients? And how are they evolving?
- What are the challenges clients face from the increasingly complex regulatory and tax environments?
- What is the right advice to give them?
- What are the potential insurance solutions that work best today?
- Case studies – how you can discuss these products with the first and second generations

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Gerard Gardner
Global Head Wealth Structuring
EFG Wealth Solutions

Michael Olesnick
Partner, Senior Advisor
KPMG

Peter Chen
Partner
Zhong Lun Law Firm

Nigel Rivers
Founder and Chief Executive Officer
Capital Solutions

Speaker

1.10pm

Closing remarks

- Summary / wrap-up
- Real-life examples of how the various insurance products covered are utilised by EFG and UHNW clients in the region

David Sussman
Managing Director
EFG Wealth Solutions

1.25pm

Buffet lunch

2.15pm

Summit ends