

# HUBBIS DIGITAL WEALTH FORUM - SINGAPORE 2023

8.30am Registration

8.55am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.00am Panel Discussion

Trends and Priorities - Private Wealth Management in Asia

- What are the key trends taking place in wealth management globally and particularly in Asia, and where are the biggest challenges and opportunities that digital solutions can help overcome?
- Where does Singapore sit in this regional/global wealth management landscape, and what are the key digital transformation needs ahead that will keep Singapore at the front of the market?
- What are the key priorities in terms of boosting internal and operational efficiencies and achieving cost savings?
- What are the key digital solutions that will help deliver greater client centricity, personalisation and client satisfaction?
- How can digital tools and solutions help incumbents stay ahead of the pack in an increasingly competitive wealth management market?
- What are some of the advantages or possibly drawbacks of the digital investment platforms?
- Regulatory and compliance challenges just keep getting more pervasive, so what can technology do to help the wealth industry overcome these in a timely, and cost-effective manner?
- What are the key trends in custody and also privacy and security, and where can digital tools improve coverage and outcomes?
- What does all this mean for the competitive environment in Singapore and further afield in Asia?
- How does technology help the wealth market to curate and then deliver advice more effectively?

Chair

David Wilson  
Principal Director, Asia Wealth Management Lead  
Accenture

Speaker

Evrard Bordier  
CEO and Managing Partner  
Bordier & Cie

Yujun Lin  
CEO, Singapore  
Interactive Brokers

Michael Blake  
Chief Executive, Asia  
UBP

Mark Buesser  
Chairman  
IMTF

9.40am

Presentation

Unlocking efficiency: The right technology allows advisers to focus on what matters – their clients.

Gareth Rees  
Head of Presales APAC  
InvestCloud

To effectively compete and provide value to clients, firms need to find the right technology solutions that will maximise efficiency and free up adviser time to focus on delivering exceptional service to their clients and growing their business.

In this presentation, we will explore:

- Why firms need to identify and implement the right technology solutions to help them maximise efficiency and grow their business.
- What specific challenges advisers are facing industry wide including productivity, data overload and providing personalisation at scale.
- How firms can leverage technology to streamline adviser workflows so advisers can spend more time on the high value work that retains and grows their clients.

10.00am

Presentation

Plug-and-Play Banking in a Constantly Evolving Wealth Ecosystem: The Choice is Yours

Andreas Mettenberger  
Associate Partner  
Synpulse

In an ever-evolving wealth landscape, banks face the tough but critical decision: build or buy a wealth platform? We'll dissect the complexities and challenges that banks encounter during this decision-making process, including integration hurdles, customisation limitations, and scalability concerns. Learn how the right solution can help your bank break through this conundrum.

10.15am

Panel Discussion

Creating efficiency through the proper use of data to elevate the client experience

- Why is data considered 'the new oil' for businesses of all types, and why is refined and processed data so important for the wealth management industry?
- What data management digital solutions and tools exist to help boost personalisation and the client journey, and where do AI and ML fit in?
- Where does AI-enhanced data link into other key protocols, such as CLM and CRM?
- As the client needs and expectations evolve, so also the wealth management proposition must evolve. Is this where ML fits in?
- What are the key competitive advantages of solutions that will help deliver greater client centricity, personalisation and client satisfaction?
- How can data management and analytics help to elevate the skills, capabilities and productivity of the RMs and advisors? Or perhaps, will AI & ML diminish/weaken the role of RMs/Advisors within the private bank industry?

- How do the private banks and wealth firms make the right decisions around data and related digital tools, and then expedite and implement them effectively?
- What is coming next?

Chair

Andrew Bresler  
Chief Revenue Officer & Deputy General Manager – APAC  
InvestCloud

Speaker

Michele Ferrario  
Co-founder and CEO  
StashAway

Vivek Gupta  
Senior Vice President, Regional Cognitive Banking and Martech  
DBS Bank

Bhaskar Vijay Singh  
Director - Financial Services Consulting  
EY

Joel Carpenter  
Divisional Director, Marketing  
St. James's Place

10.45am

Presentation  
Scaling Without Pain – Can you have your cake and eat it too?

Darell Miller  
Managing Director APAC  
Wealth Dynamix

Wealth Dynamix are leading providers of Client Lifecycle Management solutions to some of the best-known names in wealth management and private banking. In this presentation we will explore:

- Why breaking the chain between revenue and costs is crucial for Wealth Managers and Private Banks that want to scale profitability
- Why does this matter now?
- How do you break the chain and enable relationship managers to better serve their clients?
- Scale, eat, repeat!

11.00am

Refreshment & Networking

11.30am

Presentation  
Re-imagining the Role of the RM

David Wilson  
Principal Director, Asia Wealth Management Lead  
Accenture

- Wealth firm ambitious growth targets
- Constraints on RM productivity

- Unlocking RM value-add
- Benefits to getting it right – increase revenue dramatically
- Starting on the journey

11.45am

#### Panel Discussion

##### Digital Solutions and the Opportunities & Challenges Around Enhancing Client Engagement

- What is optimal client engagement all about today, how has it evolved, and where is it heading?
- Where can the 'human touch' be augmented or possibly replaced by digital engagement? Across the wealth spectrum, or is client engagement more nuanced between the different wealth categories, i.e., for the key mass affluent, HNW and UHNW client segments?
- How do you deliver advice, robust and more valuable and constructive engagement and at the same time do so at a greater scale?
- Ultimately, private clients want to achieve strong portfolio performance, so how do competitors enhance their engagement around 'portfolio solutions' for their clients?
- How can digital tools and solutions help enhance the delivery of best-in-class products and advice?
- Can technology improve risk management and the articulation of risk parameters for their clients?
- How do private banks and other firms better engage with clients on ESG and sustainability?
- How can you deliver better insights and guidance on next-best-action?
- Engagement does not stop with advice and execution, it extends deep into performance data and reporting and portfolio refinement, so what tools and approaches help in these areas?
- Does better engagement translate to improved client acquisition and retention?
- What solutions and tools are in the pipeline that will further enhance personalisation, relevance and higher-quality advice?

#### Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

#### Speaker

Nicole Bodack  
Managing Director, C&IB, Wealth & Asset Management, APAC  
Accenture

Guillaume Roux-Chabert  
Head of Sales, Singapore  
Interactive Brokers

Darell Miller  
Managing Director APAC  
Wealth Dynamix

12.15pm

#### Presentation

Private Bank, Bank, Broker – where should you safekeep your client assets?

Ivan Chang  
Regional Manager, Institutional Business  
Saxo

- We will explore how each provider offer differing value propositions
- How would you evaluate their individual merits and consider the trade-offs between them

12.30pm

Panel Discussion

#### Future Proofing the Wealth Management Platform

- What are the key priorities in terms of boosting internal and operational efficiencies and achieving cost savings?
- What are the key priorities around client personalisation and improving engagement?
- Is there a sufficiently strategic approach to using digital to improve systems and processes, as well as to help these banks and private wealth management firms deliver better products, advice and outcomes for their clients?
- How are you balancing off the platform's self-serve capabilities and the clients' need for human connectivity and advice? How important is scalability?
- What is coming next in the world of digital technologies and services that will further enhance the wealth management offering in the region, and how can those improve the proposition?
- How are you making the organisation more agile?
- Can you clearly see how to fully monetise your various digital investments and transformations?
- How do you make the right decisions and then expedite and implement them effectively?
- What are the key pitfalls to avoid?
- What core approaches can market players take to ongoing digital transformation? Should they build, buy, or outsource, and how can they properly assess the providers?
- Who implements the decisions, and is enough being done to ensure the right levels of internal adoption/buy-in, and to make sure that the private clients understand the advantages and can make full use of the new and improved suite of capabilities on offer?
- What is coming next down the digital highway, and what are the implications?

Chair

Yash Shah  
Partner  
Synpulse

Speaker

Nayeem Khan  
Chief Operating Officer - BPCAL and South Asia  
Pictet

Ravi Kanteti  
Associate Partner - Singapore  
Bain & Company

Steve Knabl  
Chief Operating Officer & Managing Partner  
Swiss-Asia Financial Services

Dr. Silvio Struebi  
Partner  
Simon-Kucher Global Strategy Consultancy

1.00pm

Lunch & Networking

2.00pm

Panel Discussion

## The rise of digital platforms for private wealth management

- How do you decide on the right platform / custodian for your clients?
- What are the trends and developments we are witnessing today?
- How are your priorities changing?
- What are the business models that are relevant to this segment?
- Have the bank crises in the US and at Credit Suisse damaged confidence in international bank brands, perhaps giving an advantage to domestic and regional banking powerhouses?
- What are the potential advantages of using a digital platform for custody and execution?
- Who do you partner with for success? Platforms / Investments / Tech?
- What must you offer to deliver a genuinely client-first advisory offering? How can digital help?
- Where do you get the best inputs when considering the advice that you give to clients? How does technology / digital help?

Chair

Rafael Weber  
Head of Institutional Clients  
Swissquote

Speaker

Urs Brutsch  
Managing Partner & Founder  
HP Wealth Management

Mauricio Ribeiro  
Partner  
MOIQ Capital

Julien Le Noble  
CEO  
GTN Asia Financial Services

2.40pm

Workshop

Introduction to Interactive Brokers digital Custody and Execution Platform for EAMs, MFOs

Guillaume Roux-Chabert  
Head of Sales, Singapore  
Interactive Brokers

- Introduction to IBKR's Institutional Platform
- Partnering for success: How IBKR helps managers scale their practice and maximize value for clients
- Augmenting your investment experience - a case study

3.20pm

Presentation  
More Effective KYC – powered by a risk-driven, real-time dynamic approach

Mark Buesser  
Chairman  
IMTF

- Dynamic Perpetual KYC – what is that?
- More granular risk rating
- Integration of all internal and external information

3.40pm

Presentation

Cross script ID matching & screening: false positives reduction & explainable AI

Declan Trezise

Global Head Consulting

Babel Street

- The impact of false positives and missed matches in screening
- AI -based smart fuzzy name matching demonstration
- Explaining matches for regulator approval and drive towards continuous improvement

4.00pm

Refreshment & Networking

4.20pm

Panel Discussion

Compliance and Onboarding – Getting it right

- What are your on boarding challenges?
- How can you streamline on boarding? And make the process more efficient?
- With recent AML issues in Singapore - does anything need to change?
- COSMIC AML initiatives and data exchange – how does this effect you?
- What's your view on open banking and sharing information with peers? Pros and cons?
- Why is there a lack of consistency across different private wealth managers?
- What can the industry do to make this all less painful and time consuming? Can it be simplified?
- What's the future of onboarding? To what extent can AI help?
- Improving Financial Crime Operations – how can this be achieved?
- Control and Risk Management – what are the challenges? How are they addressed?
- Dynamic Perpetual KYC – what does this mean?
- More granular risk rating – how can this be executed?
- Integration of all internal and external information – how can you best achieve this?

Chair

Michael Stanhope

Founder & Chief Executive Officer

Hubbis

Speaker

Lucy Gao-Azak

COO & Head of Wealth Management

Crossinvest

Ajit Vaidya

Head of International Wealth Management Operations

Nomura

Mark Buesser

Chairman

IMTF

Declan Trezise  
Global Head Consulting  
Babel Street

Andreas Wenger  
Partner  
Finalix

5.00pm

Forum Ends