

Independent Wealth Management Firms in Asia - Growth Strategies

3.00pm

Independent Wealth Management Firms in Asia - Growth Strategies

- What are the key developments that have been driving the evolution of the independent wealth management sector in recent years?
- Where is the growth going to come from in the foreseeable years ahead?
- Can Asia's independent wealth sector really grab a much larger share of the AUM, as has been happening for example in Switzerland as the leading IWM market?
- Can the independents entice more HNW and UHNW clients in Asia to migrate away from the big brand names such as the global, boutique or regional banks, and further towards the independent model, and if so, how?
- What do the existing competitors need to do to adapt their strategies, product offering, services, team and operations to seize the growth opportunities ahead?
- And what about the new entrants? What potential is there for them and where do they see the growth potential?
- Can the independents win a larger share of DPM from their existing clients and if so how?
- How can the existing competitors win over the growing ranks of Asia's younger wealthy, who are both inheriting trillions in the coming decade or more, and who are also making or controlling Asia's next wave of vast private wealth?
- What are the vital factors to consider when upgrading the technology of an independent wealth firm? And where is the investment required today?
- Should the independents outsource to digital platforms and other partners to offer a truly global product, advisory, execution and administration suite to clients?
- What will the IWM community need from custodians in the future? Wider range of products? Better execution? More efficient and lower cost custody?
- What are the right fee models, and are retrocessions still part of the overall picture?
- To seize the growth potential, how do you attract and retain talent to expand in the future?
- What is the 'secret sauce' for the independents to seize the growth opportunities ahead?

Donald Klip
Managing Director, Co-Founder
Global Mortgage Group

Urs Brutsch
Managing Partner & Founder
HP Wealth Management

Luke Moore
Chief Executive Officer
Oreana Financial Services

Rafael Weber
Head of Institutional Clients
Swissquote

Harmen Overdijk
Chief Investment Officer
Leo Wealth

4.00pm

Webinar Ends