Hubbis Independent Wealth Management Forum 2018

8.55am

Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am

Panel discussion

What do you stand for? What do you focus on?

- What are the different business models? What's working?
- Is there a growing divide between local IAM's and European style IAM's? To what extent it this an issue?
- Are you genuinely client-centric? Independent and transparent?
- What are some of the ways EAM / IAM can differentiate themselves from a typical private bank?
- What must this industry do to dramatically move forward?
- Innovation and evolution - How will you adapt to constant changes in technology, investor behaviour and regulation?
- From a non-investment perspective – how do you service your clients and add value?
- How are you considering the next generation?
- What does the client really need from you? Typically, do they even know?
- How will choose your 'future leaders'? Whats YOUR succession plan?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Tariq Dennison
Wealth Manager, US-Asia
GFM Asset Management

Urs Brutsch
Managing Partner & Founder
HP Wealth Management

Kenny Ho
Managing Partner & Founder
Carret Private Capital

Oliver Balmelli
Deputy Chief Executive Officer and Head of Private Banking - Singapore
EFG Bank

Jaydee Lin
Chief Operating Officer & Managing Partner
Raffles Family Office

John Wong
Partner, China and Hong Kong, Private Client Services Leader Tax Services
PwC

9.45am Presentation
Digital delivery of wealth management - the era of the platform?

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

- Transition of wealth management into the digital era
- Distribution / connectivity is key

9.55am Presentation
Current Wealth Management Trends

Irene Lee
Business Development Director, Intermediary and Partnership
Hawksford

- Overview - Asia in General; GDP and Growth
- Updates on Singapore and Hong Kong as Wealth Management Centres
- Brief Updates on CRS and AEOI
- Tax Compliant Estate Planning Tools

10.05am Head - to - Head Q & A

Physical Gold – making a shiny and solid contribution to any portfolio

David Fergusson
Chairman
Global Precious Metals

- Why should you buy physical Gold?
- How should you buy it? Or not buy it?
- Where should you store it?

10.15am Panel discussion

What's the opportunity that the growing wealth in China represents to you?

- What's the role that Hong Kong based IAM could play in the future access to China wealth?
- How can domestic and offshore firms collaborate?
- What do clients want from their off-shore wealth management partners?
- Is there an opportunity to help with investments as these clients look to diversify?
- The globalising of Chinese wealth and trends to watch
- How are the different business models evolving in regional onshore wealth management markets?
- Do Chinese clients have unique expectations around technology, products and service?
- Are there any real family offices in China? What do they do? What are their needs?
- What are the Tax and Wealth Planning considerations today?
- In a new transparent world – how are the Chinese dealing with legacy and the next generation?

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Nigel Rivers
Founder and Chief Executive Officer
Capital Solutions

James Russell
Managing Director, Hong Kong
Equiom Group

Michael Olesnicky
Partner, Special Advisor
KPMG

Jacqueline Shek
Executive Director, Trust Services
ZEDRA

Peter Golovsky
Managing Director, Global Head of Fiduciary Services and Head of Asia
Cone Marshall

11.00am	Presentation Wealth Preservation & Wealth Transfer – Knowns & Unknowns

David Denton
Head of International Technical Sales
Quilter International

- Are HNW clients' wealth needs fulfilled by the insurance products in the market place?
- What opportunities remain overlooked or not yet fully-realised?
- How to better manage multi-jurisdictional assets with respect to wealth preservation?
- How can HNW clients achieve wealth transfer despite the regulatory and tax complexities in today's world?

11.10am	Presentation Recent Trends and Developments in Investor Migration

Qishi Fu
Senior Manager
Henley & Partners

- Global trends and developments in investor migration
- What's driving investor migration for Asian HNWIs?
- Key considerations for HNWIs in relation to residence and citizenship planning

11.20am	Refreshment & Networking
11.45am	Presentation Asia Future Leaders – Finding leading management teams demonstrating clear innovation in Asia

Chris Chan
Portfolio Manager
EFG Asset Management

- Asia is catching-up and even leading the West in new age, growth areas through their own innovation
- The US has shown that the most successful companies are those with visionary leadership driving innovation from the top throughout the firm
- So in a world of constant disruption, it is ever more important to focus on the quality of management teams and their ability to innovate

11.55am

Presentation
The Revival of the Employee Benefit Trust

James Russell
Managing Director, Hong Kong
Equiom Group

- What's driving the resurgence of the Employee Benefit Trust?
- The positives and pitfalls for advisors
- Challenges for the future and keeping Hong Kong at the forefront of the market

12.05pm

Presentation
Where Next? Tax implications of residence planning for HNW families

Pierre Vanrenterghem
Manager, South East Asia
Rosemont

- Overview of selected tax regimes in Europe
- Implications of family relocation on their income tax, wealth tax, inheritance tax, etc.
- Potential structuring solutions

12.15pm

Panel discussion

Are you growing your platform? What motivates you to do it? What are the problems?

- How do you attract the right people without paying them a massive basic salary?
- What motivates them to join YOU?
- Bankers bring legacy clients to the EAM platform but how can you get new clients?
- What's the alignment of interest?
- Who owns it? Is it the same as working for private bank if you don't own it?
- Let's imagine you want to add just two RMs to your platform this year – what are the challenges? Is it difficult to find someone to join you that shares your value system and embraces the unique culture?
- Can you improve processes? And can you make the connection between this and increased revenue?
- Is critical mass an issue? When do economies of scale kick in? When a company grows you face ballooning costs. Can you travel the road from 'small' to 'medium sized' without dying on the journey?
- If you diversify will you damage the existing value proposition?
- How can you best deal with your practice management, governance and controls?

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Speaker

Mark Brady
Executive Director, Institutional Asset Management
Venture Smart

Jon Dingley
Head of Private Wealth
CBH Asia

Riccardo Lehmann

Rohit Bhuta
Chief Executive Officer
Crossinvest

13.00pm	Presentation Finding the best starts ups around the world: Investment process of a super angel investor

Ian Sosso
Founder & Managing Partner
Monte Carlo Capital

- What are super angels
- Why investing in start ups can be the most profitable asset class
- From deal sourcing to due diligence, deal structuring, and working with portfolio companies till exit

13.10pm	Lunch
13.50pm	Room A – Workshop

Delivering wealth management via a digital platform

Swissquote Bank present their market-leading digital, global-trading and custody platforms for Independent Asset-Managers

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

13.50pm	Room B – Workshop

Solutions on Wealth Preservation & Wealth Transfer For HNWs

This is a workshop to share the HNW clients' needs and concerns on wealth preservation and inter-generational wealth transfer. At the workshop, we will discuss how a private placement life insurance (PPLI) and variable universal life (VUL) help solve the concerns of the HNWs. You should attend:

- If any of your clients own wealth internationally such as holding UK and US assets directly
- If any of your clients own London residential property
- If any of your clients are planning to move to Australia
- If you are looking for a solution to simplify CRS
- If any of your clients are very concerned about confidentiality when planning for succession

David Denton
Head of International Technical Sales
Quilter International

Fred Wong
Head of HNW Solutions Hong Kong & NE Asia
Quilter International

14.30pm Room A – Workshop

Leading Residence and Citizenship-By-Investment Programmes

- Overview of Immigration programmes
- European Citizenship-by-Investment in Malta and Cyprus
- EB-5 is not the last solution to the US
- The exclusive residence programmes in Asia

Jonathan Tang
Director
Henley & Partners

14.30pm Room B – Workshop

Managed Accounts in Asia

Managed accounts are one of the largest and fastest growing segments of the wealth management market globally, eclipsing $5 trillion of assets in the U.S. market alone. Increasingly they are available in Asia as an important tool for wealth managers to access third party asset managers to implement tailored and transparent solutions for their discretionary portfolio management clients.

- What is a managed account?
- How does it work?
- Making money for clients with managed accounts
- Why is a managed account relevant in Asia today?
- Who is Axial Partners?

Anthony J. Harper
Chief Executive Officer and Co-Founder
Axial Partners

15.10pm Refreshment & Networking

15.30pm Panel discussion

Products and Platform. What's your real value proposition?

- What are the challenges and opportunities you face today around products and services?
- How can you improve your platform? • What is your investment process and philosophy? How do you deliver advice?
- Can you pick investment products better?
- Can you really do due diligence of funds?

- How can independent firms deliver alpha?
- Whats the opportunity that insurance represents to you and your clients?
- Does your platform need to be shaken up and reengineered?
- FinTech and Robo Advice – does it have any real relevance to you?
- How do you decide who to partner with?
- What can you outsource? What's impossible to outsource?
- How can you increase revenue? Reduce costs?
- How can you compete with the big private banks?

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Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

Werner Schlossmacher
Managing Director, Platform Solutions Group, APAC Solutions, Markets, Asia Pacific
Credit Suisse Private Banking

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

Keith Wong
Chief Executive Officer
Winland Wealth Management

David Varley
Chief High Net Worth Officer, Hong Kong
Sun Life Financial

Sandro Dorigo
Business Development Head
Leonteq Securities

David Friedland
Managing Director, Asia Pacific
Interactive Brokers

16.15pm Panel discussion

What products do you have that you feel would be most valuable to HNW / UHNW clients?

- What funds / investment products have you got that are specifically relevant to this IAM audience?
- Whats the role of structured products at times like this?
- How do clients buy and store physical gold? What's the importance of this for a typical client?
- Private vs Public – whats best?
- What strategies will enable Asian investors get higher returns, whilst been mindful of potential market challenges today?
- Global equity markets have seen a strong run. Does it still have legs? Or are we reaching a terminal stage?
- Where do you now turn to drive long-term returns for a portfolio?
- How are you helping your clients access interesting and unique investment solutions – for example in the private debt and private equity space?

- How do you help clients access these opportunities and how do you package these solutions?
- Do you buy private assets and real estate – how important is this? How do you access these opportunities?

Chair

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Speaker

Nicholas Hulme
Executive Director, General Manager Unigestion Asia
Unigestion

Tony Wong
Head of Intermediary Sales
CSOP Asset Management

Alain Groshens
Co-Founder & Chief Executive Officer
SystematicEdge

Tobias Bland
Chief Executive Officer
Enhanced Investment Products

Terry Tsang
Chief Investment Strategist
Premia Partners

17.00pm Forum End